PeopleSoft Training

Payroll Training Guide LSUNO V9.1

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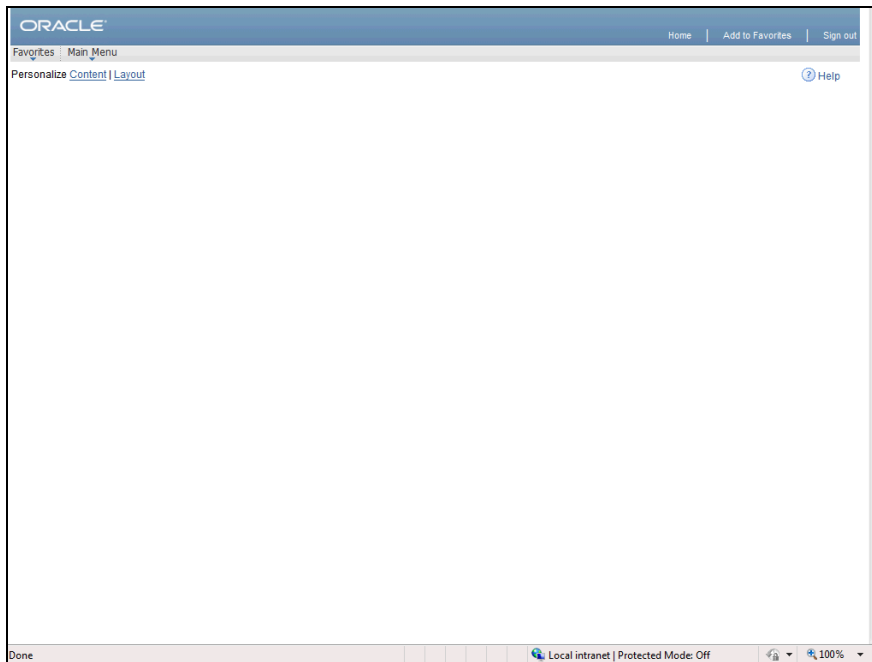# Payroll Training Guide LSUNO V9.1

Update Employee Payroll

Update Employee Tax Data

Procedure

In this topic you will learn how to **Process Employee Tax Data** in the PeopleSoft System.

Step	Action
1.	Click the **Main Menu** button.
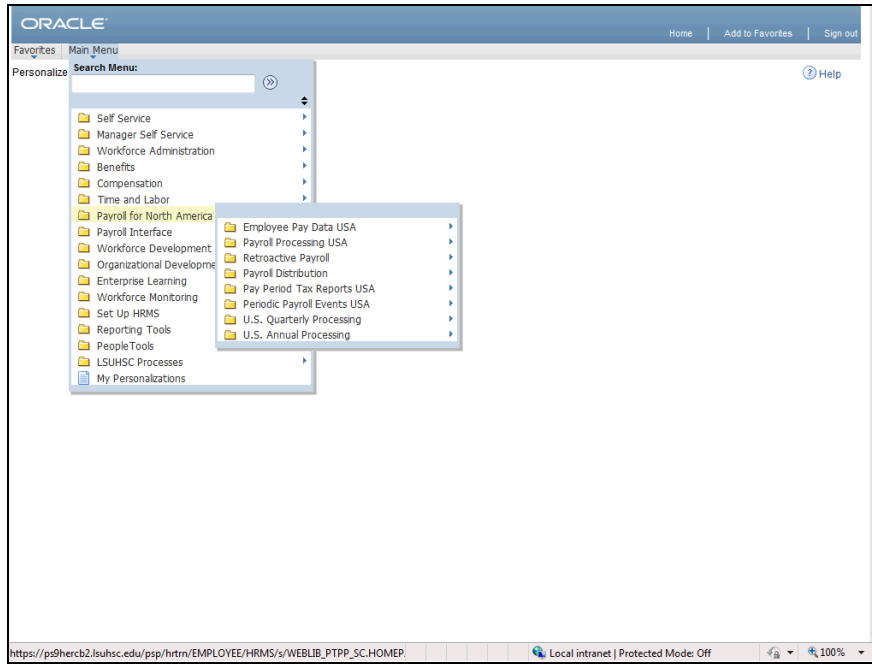
Step	Action
2.	Point to the **Payroll for North America** menu.

Step	Action
3.	Point to the **Employee Pay Data USA** menu.
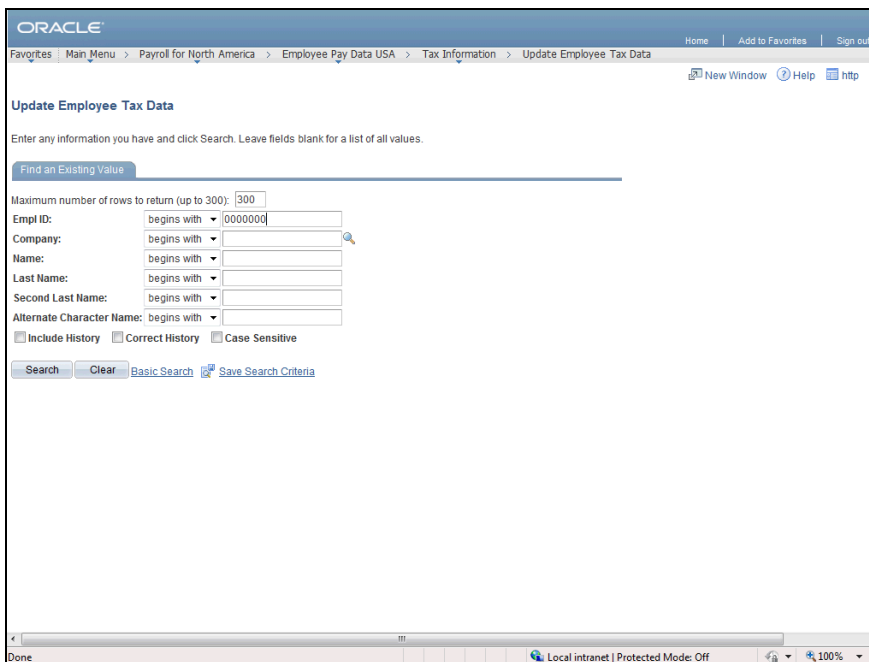
Step	Action
4.	Point to the **Tax Information** menu.
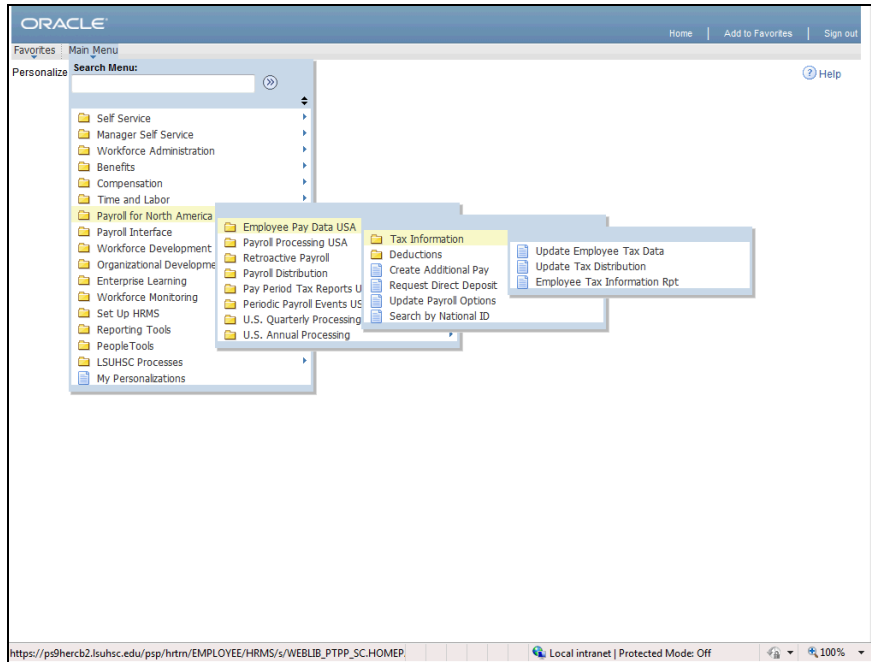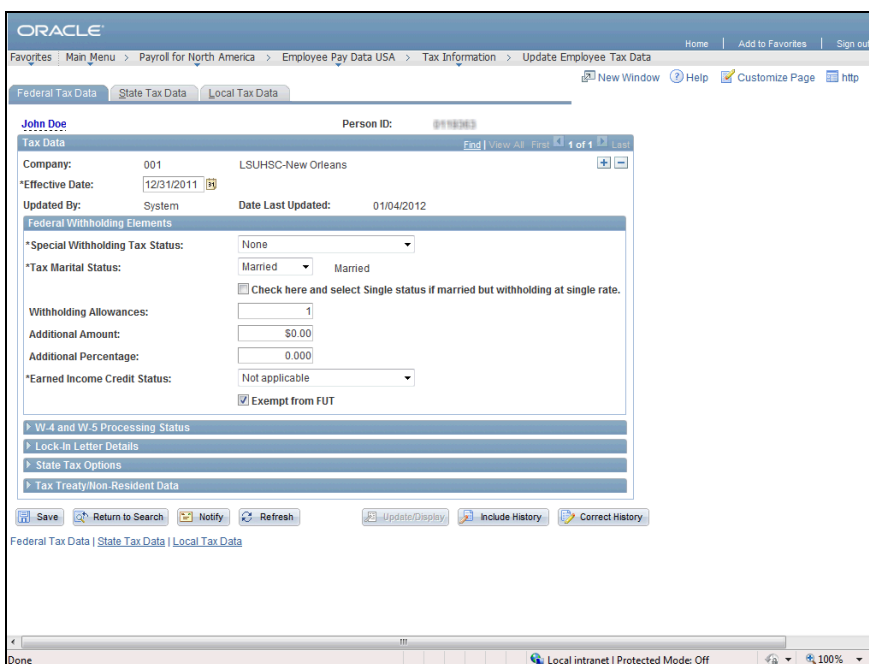
Step	Action
5.	Click the **Update Employee Tax Data** menu.
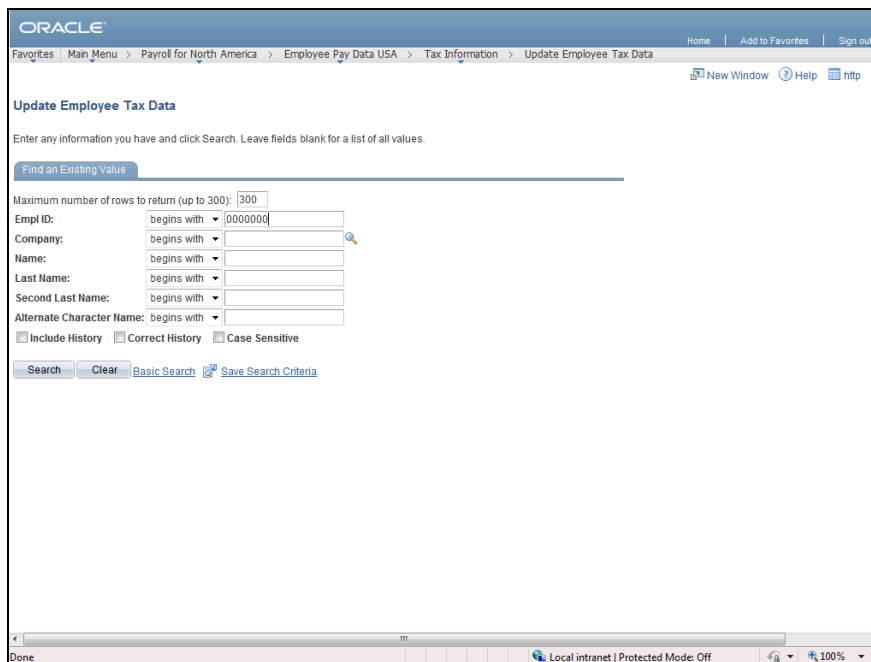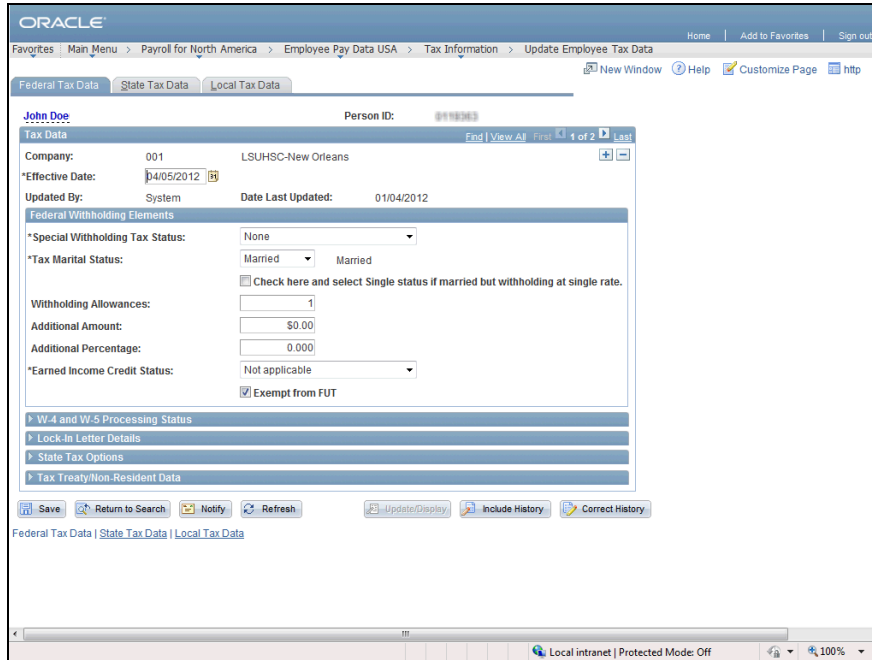
Step	Action
6.	Search for the employee by entering the EMPL ID or by Last Name.

Step	Action
7.	Click the **Search** button.
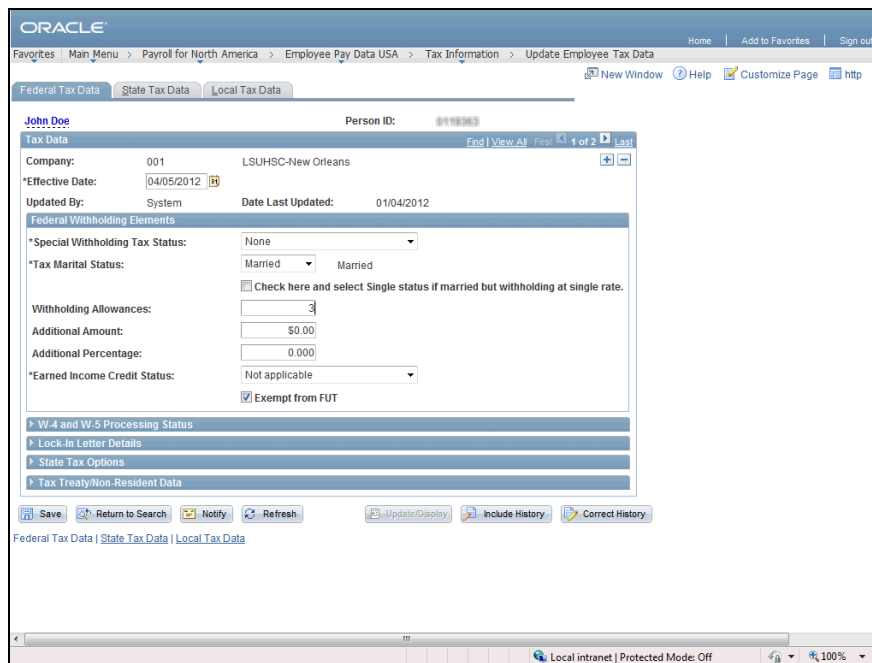
Step	Action
8.	Click the **Add a new row at row 1** button.

Step	Action
9.	Enter the desired information into the **Withholding Allowances** field. Enter "**3**".
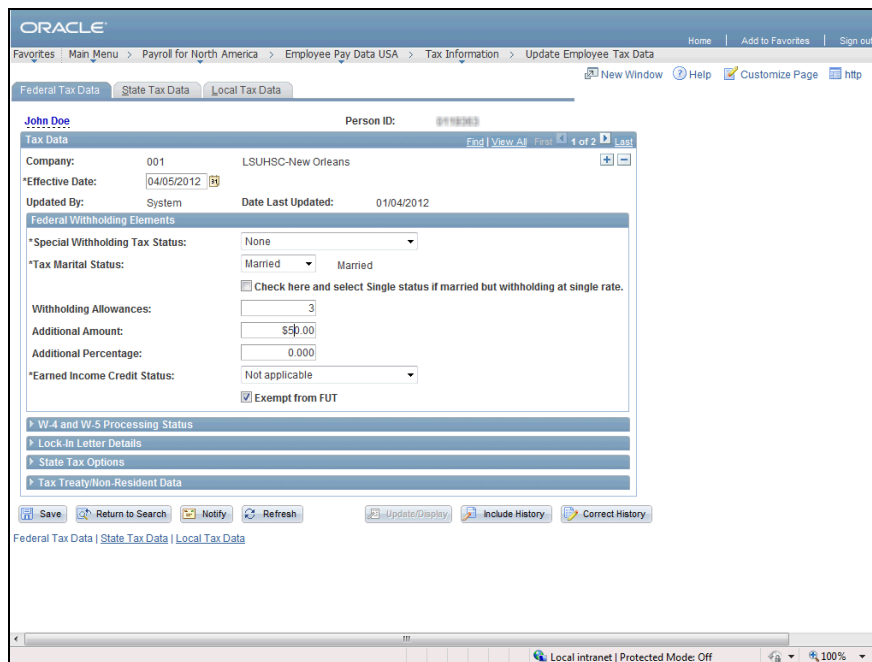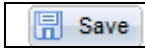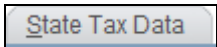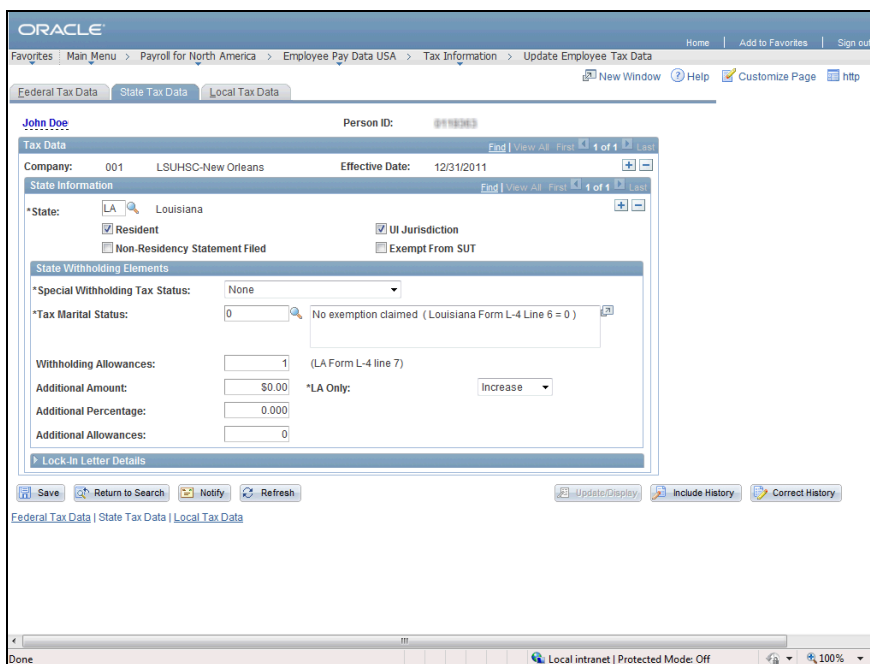
Step	Action
10.	Enter the desired information into the **Additional Amount** field. Enter "**50.00**".
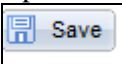
Step	Action
11.	Click the **Save** button.
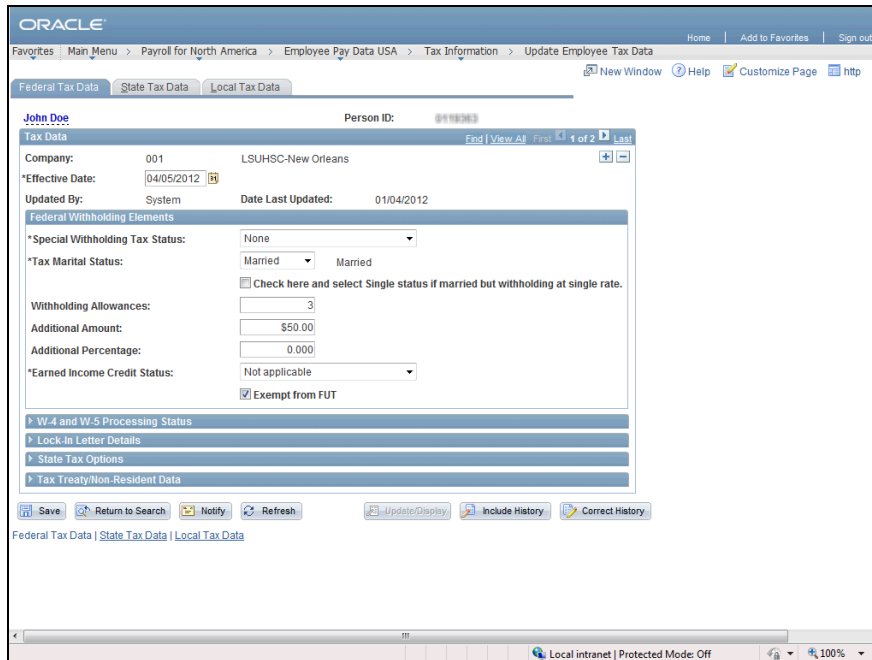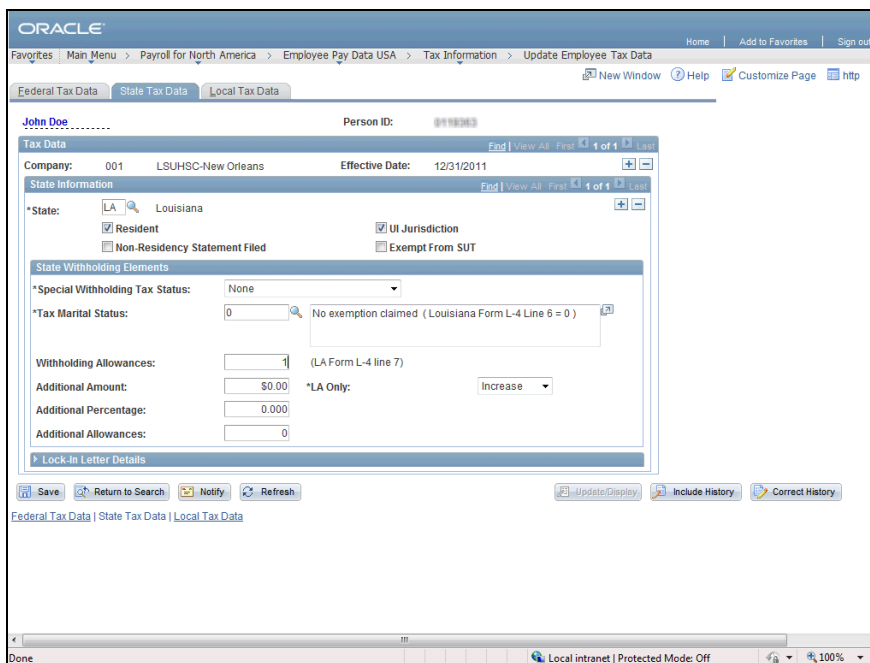
Step	Action
12.	Click the State Tax Data tab to update State Tax data.

Step	Action
13.	Update State Tax data then click the SAVE button.

Step	Action
14.	This completes the topic on Updating Employee Tax Data. **End of Procedure.**

Adding Additional Pay

Procedure

In this topic you will learn how to **Add Additional Pay** for an employee.

Step	Action
1.	Click the **Main Menu** button. Main Menu
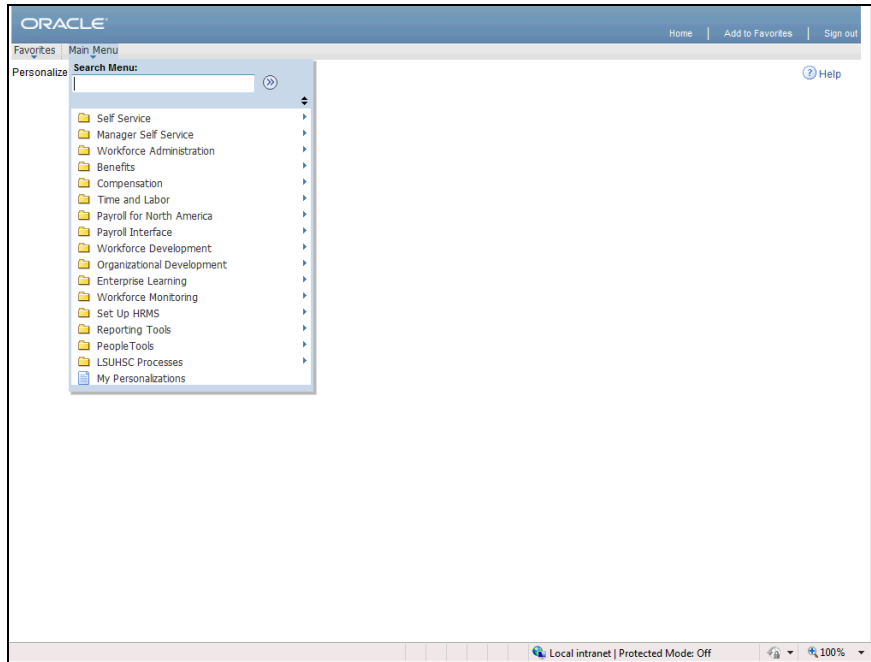
Step	Action
2.	Point to the **Payroll for North America** menu.
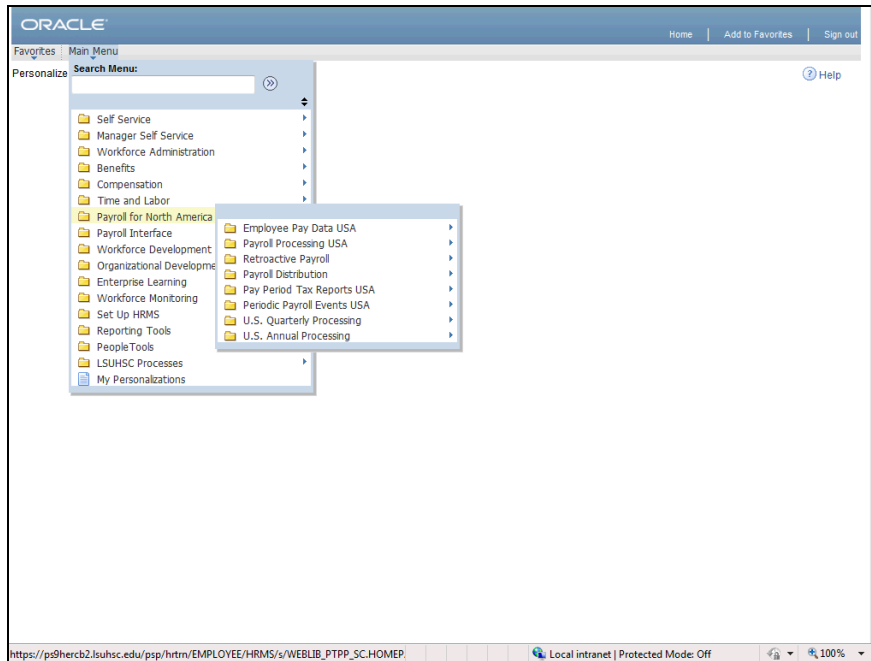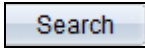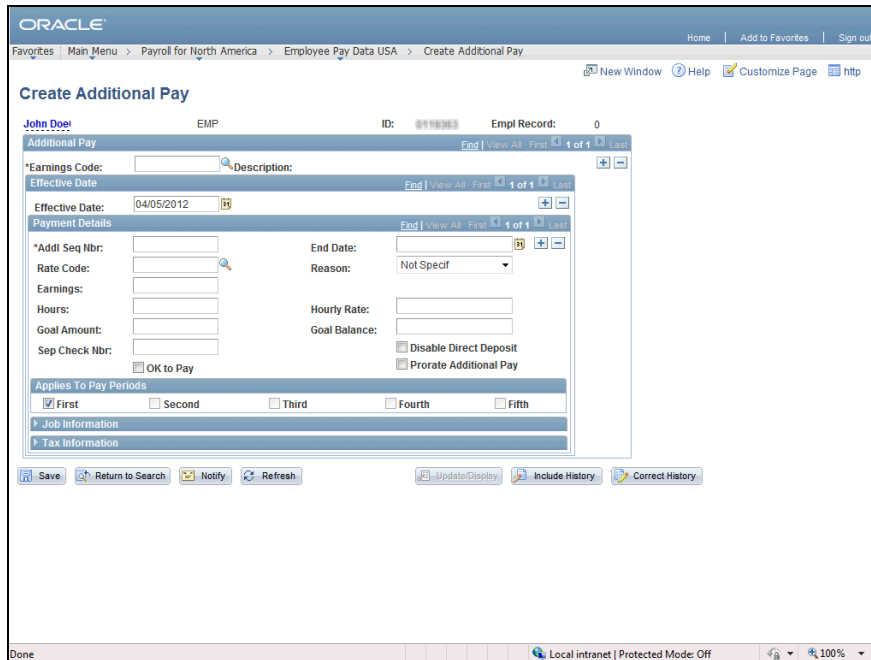
Step	Action
3.	Point to the **Employee Pay Data USA** menu.

Step	Action
4.	Point to the **Create Additional Pay** menu.
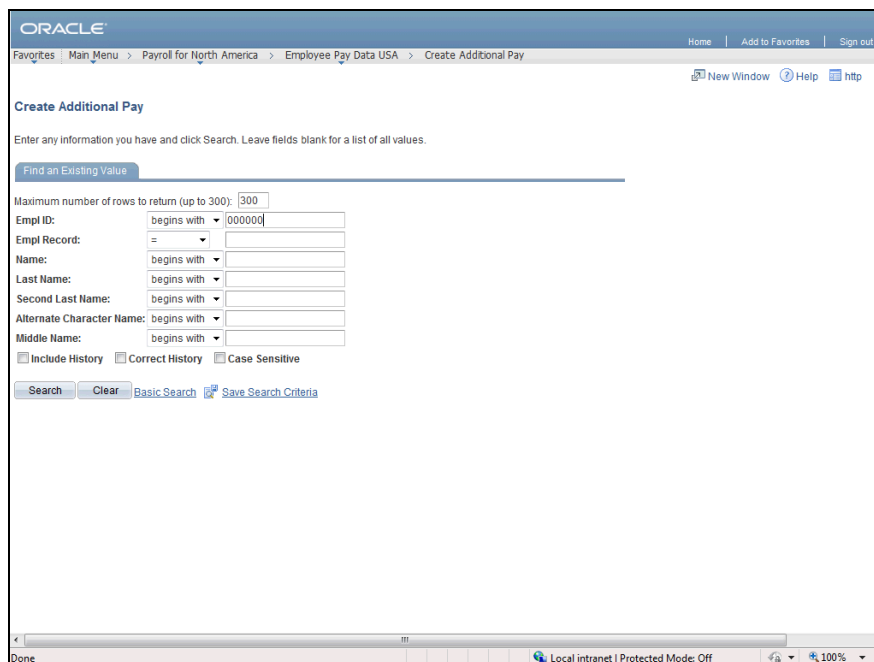
Step	Action
5.	Click the **Search** button. Search
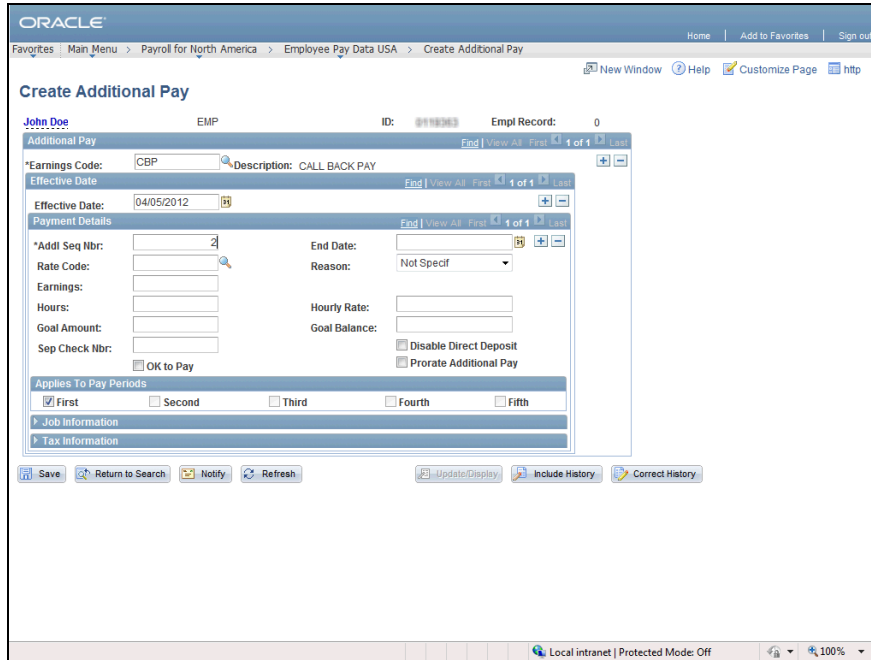
Step	Action
6.	Click the Look up Earnings Code button.
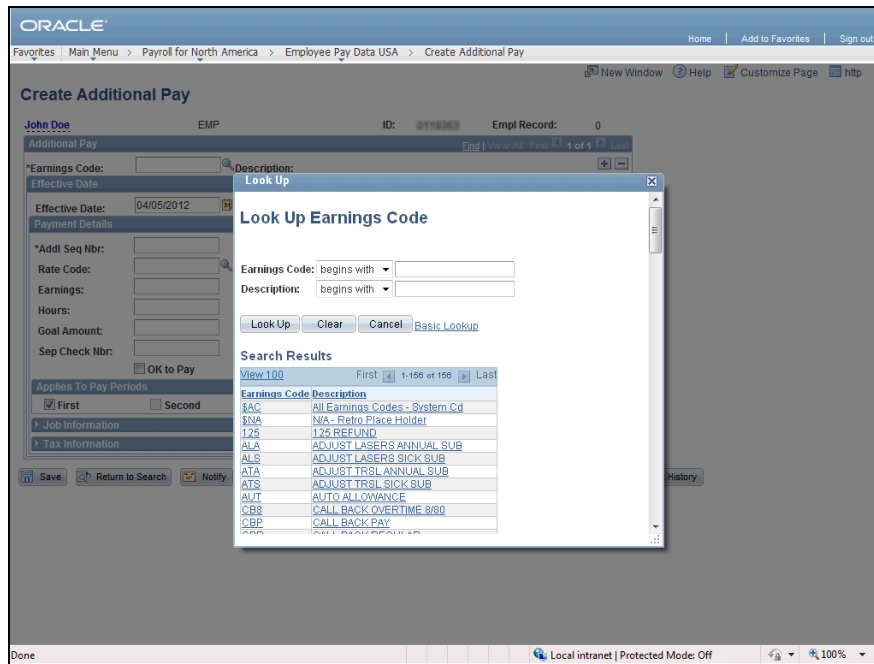
Step	Action
7.	Select one of the Earnings Code from the drop-down list. Click the CALL BACK PAY link. CALL BACK PAY
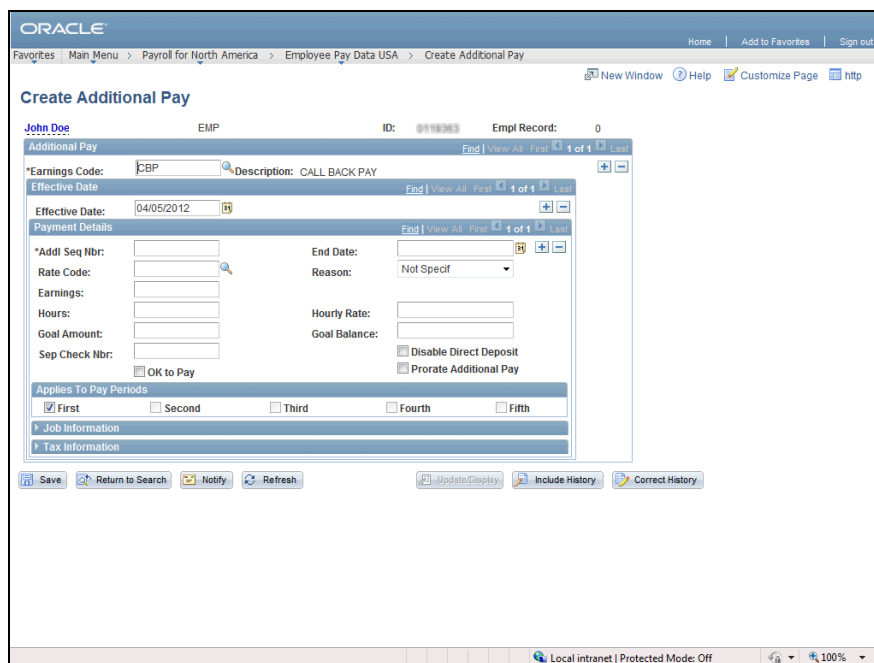
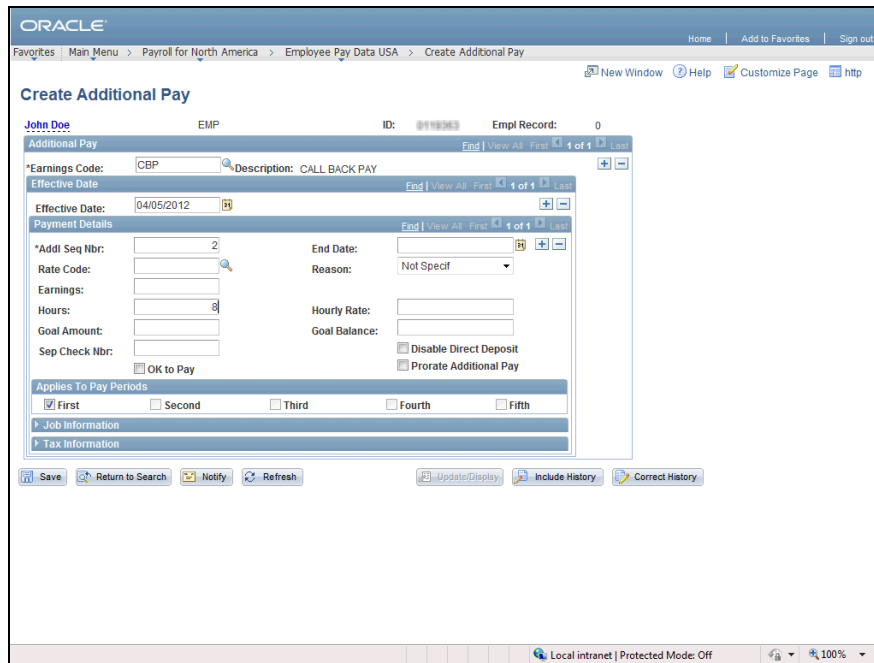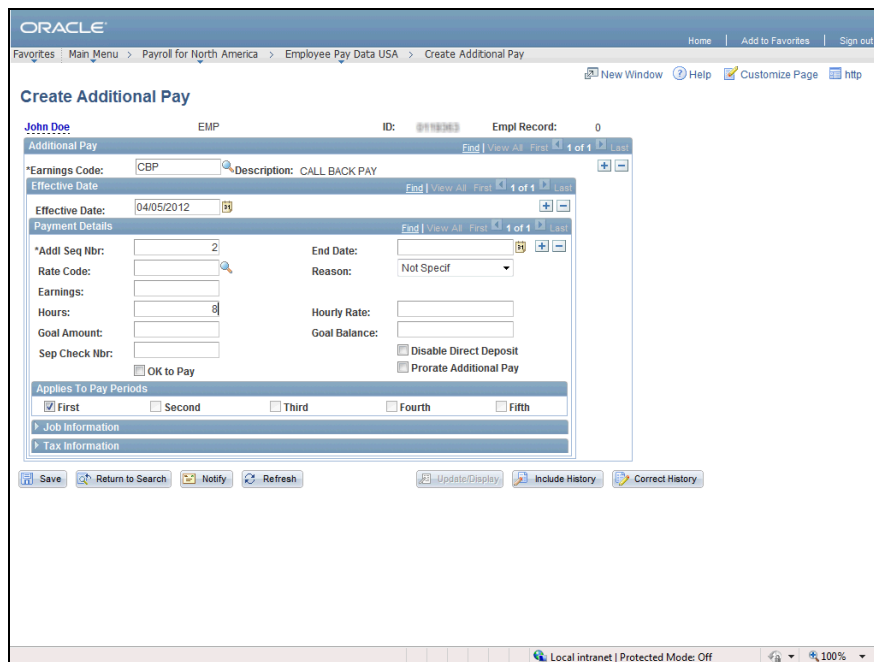| Step	Action
8.	Enter the desired information into the Addl Seq Nbr field. Enter "input text".

Step	Action
9.	Enter the desired information into the Hours field.

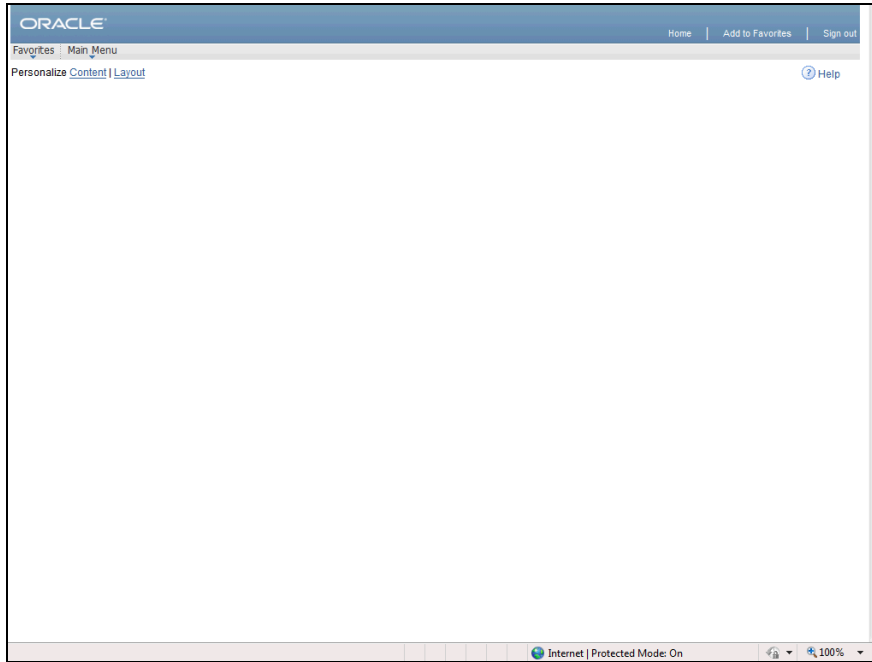| Step	Action
10.	Click the **SAVE** button.

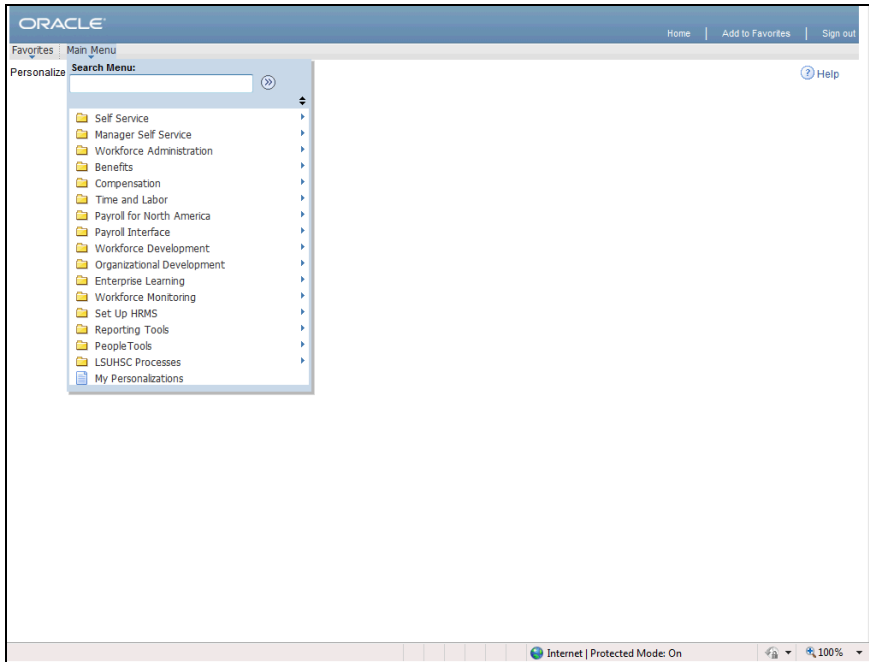| Step	Action
11.	This completes the topic on Creating Additional Pay. **End of Procedure.**

Record a General Deduction

Procedure

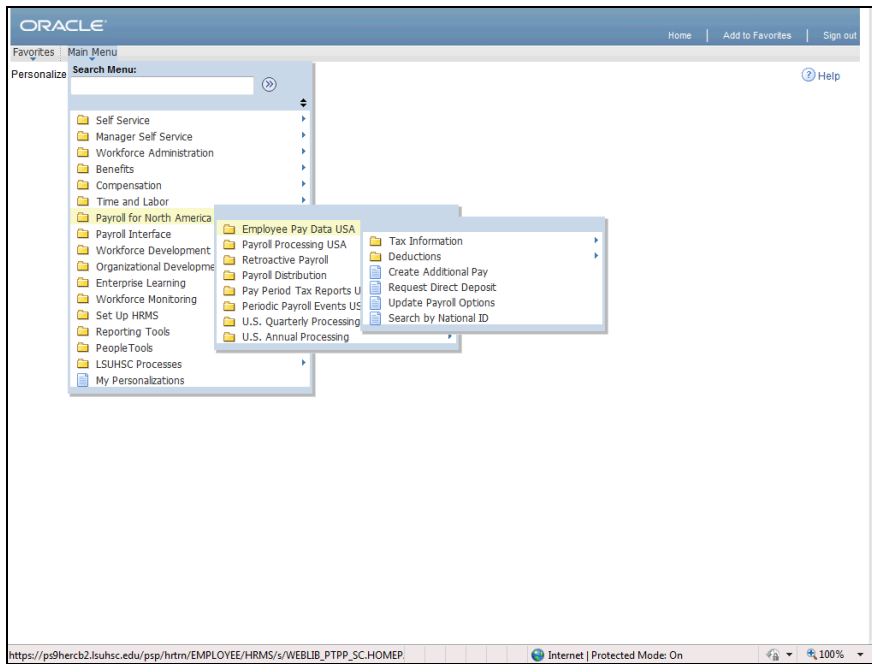In this topic you will learn how to **Record a General Deduction**.

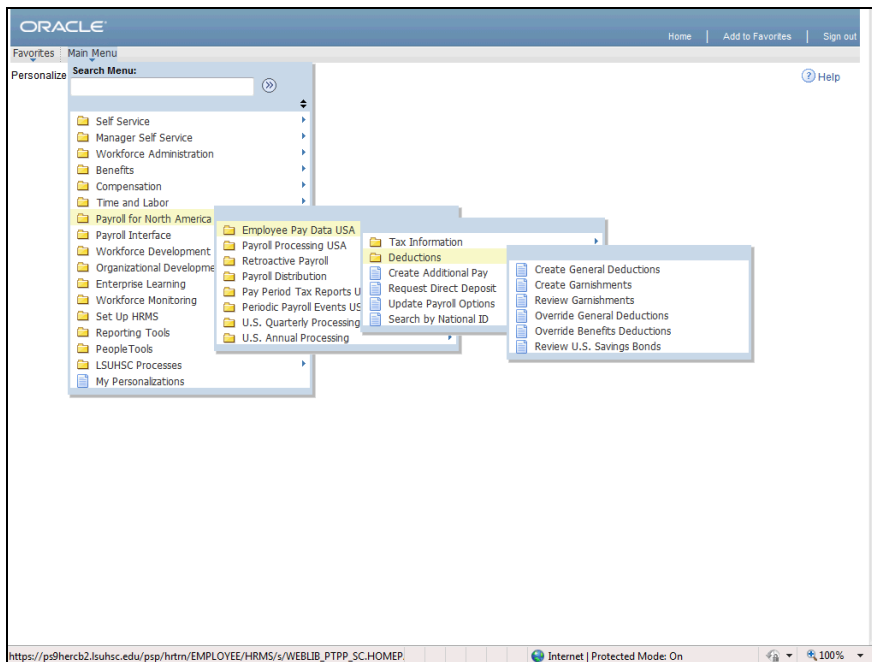| Step	Action
1.	Click the Main Menu link. Main Menu

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Step	Action
2.	Point to the **Payroll for North America** menu.

Step	Action
3.	Point to the **Employee Pay Data USA** menu.
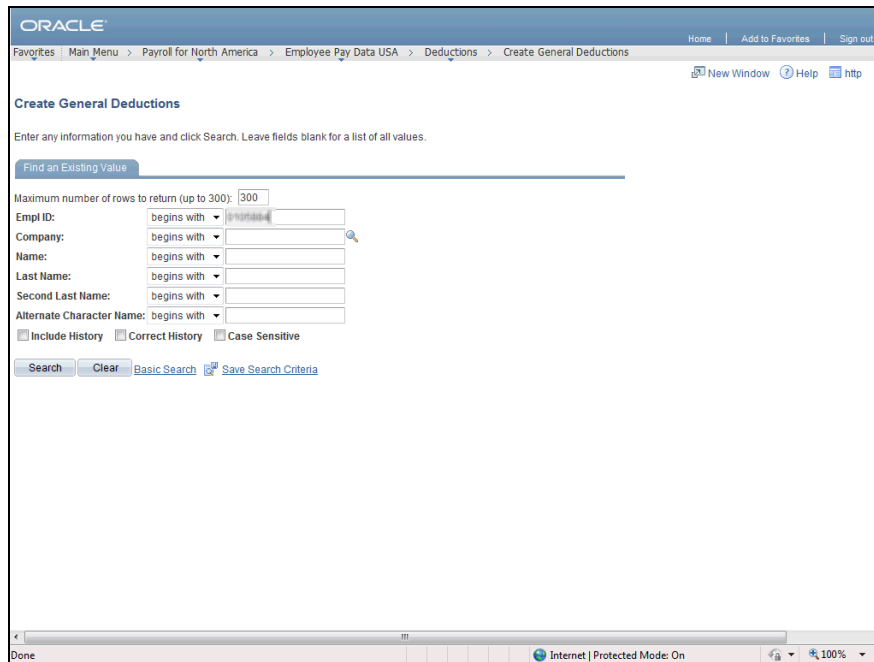
Step	Action
4.	Point to the **Deductions** menu.

Step	Action
5.	Click the Create General Deductions menu.
	Create General Deductions
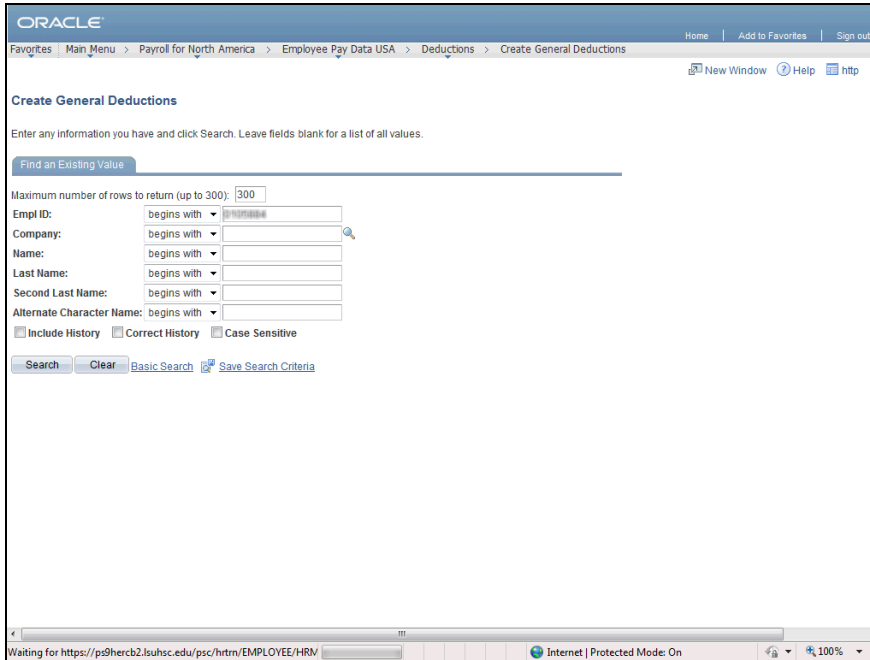
Step	Action
6.	**Note:** You can search for an employee by entering their Empl ID or by entering their Last Name.
	Enter the desired information into the Empl ID field. Enter "0000000".

Step	Action
7.	Click the Search button.

Step	Action
8.	Click the **Look up Deduction Code** button.
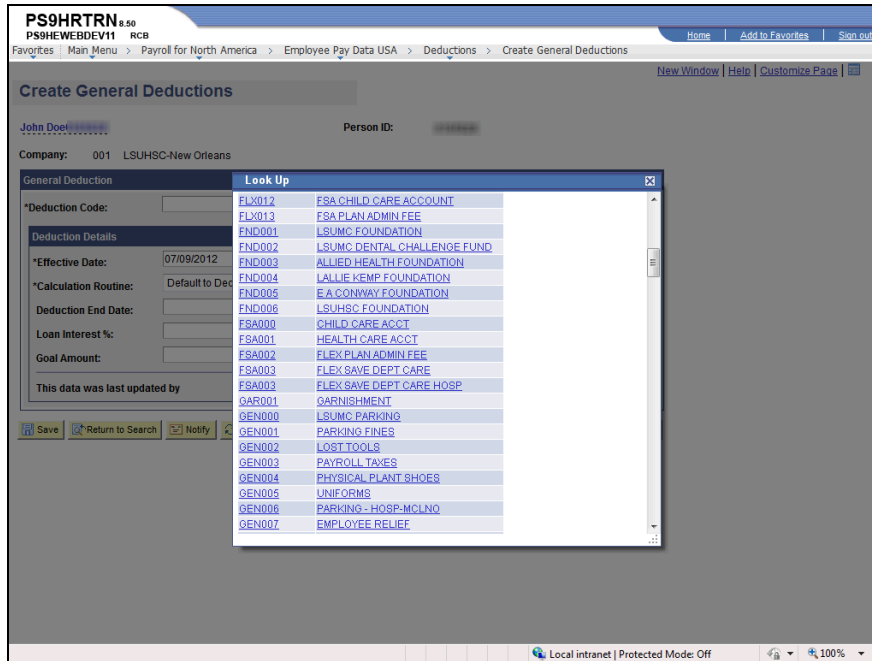
Step	Action
9.	Select a **Deduction Code** from the drop-down list.
	GAR001

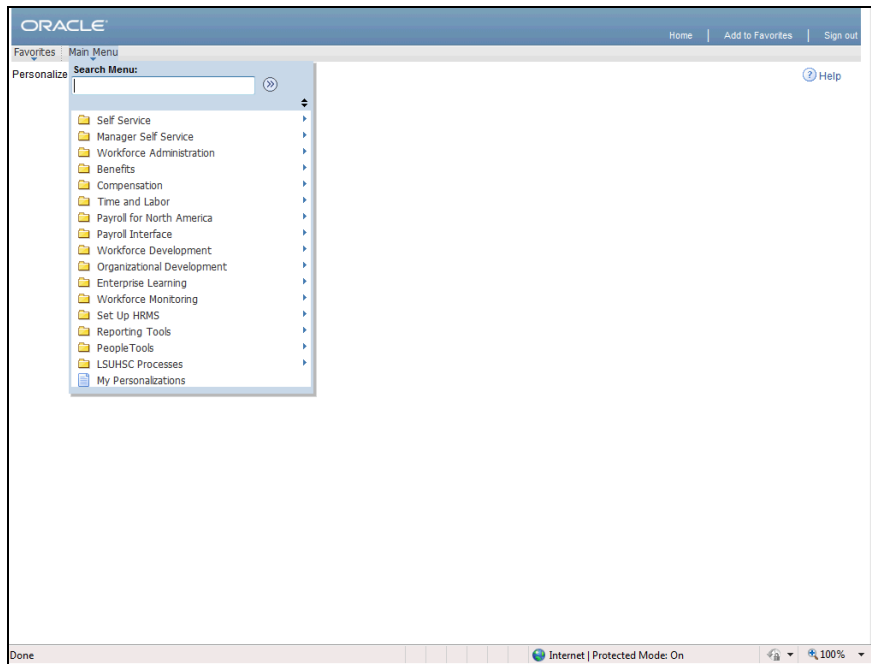| Step	Action
10.	Click the Save button.
11.	This completes **Record a General Deduction.** **End of Procedure.**

Record Direct Deposit

Procedure

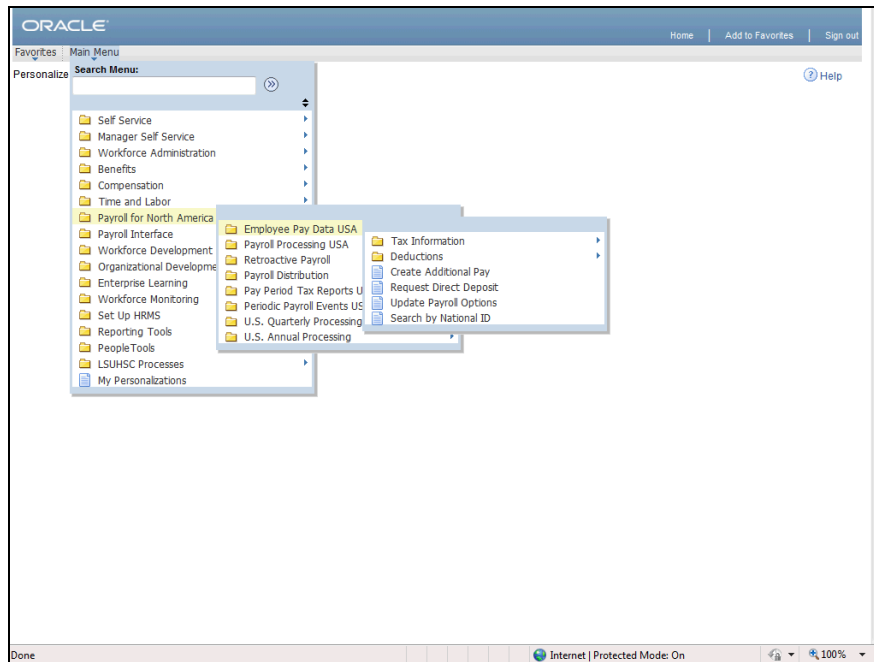In this topic you will learn how to Record a Direct Deposit.

Step	Action
1.	Click the Main Menu link. Main Menu

Step	Action
2.	Point to the Payroll for North America menu.
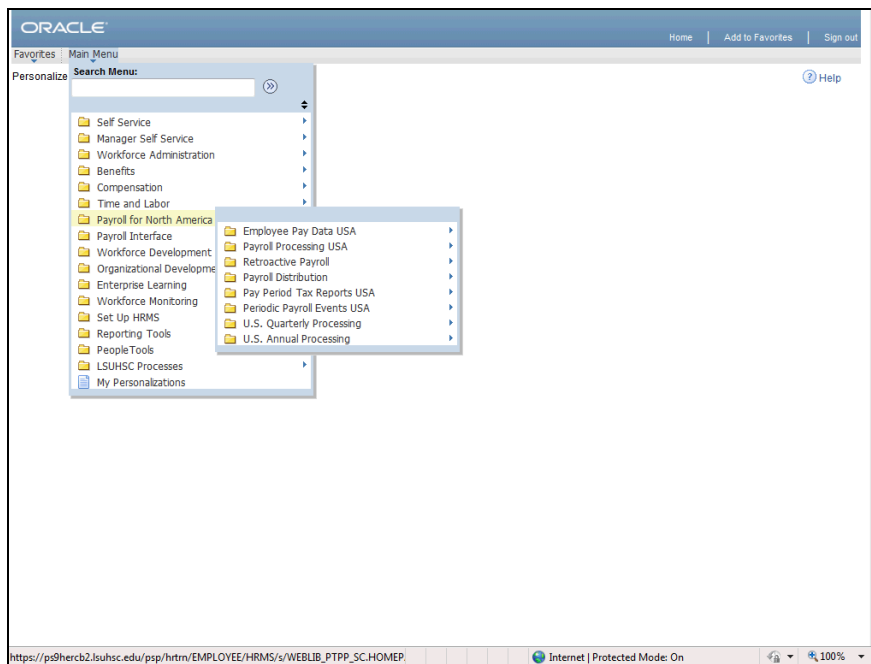
Step	Action
3.	Point to the **Employee Pay Data USA** menu.

Step	Action
4.	Click the **Request Direct Deposit** menu.
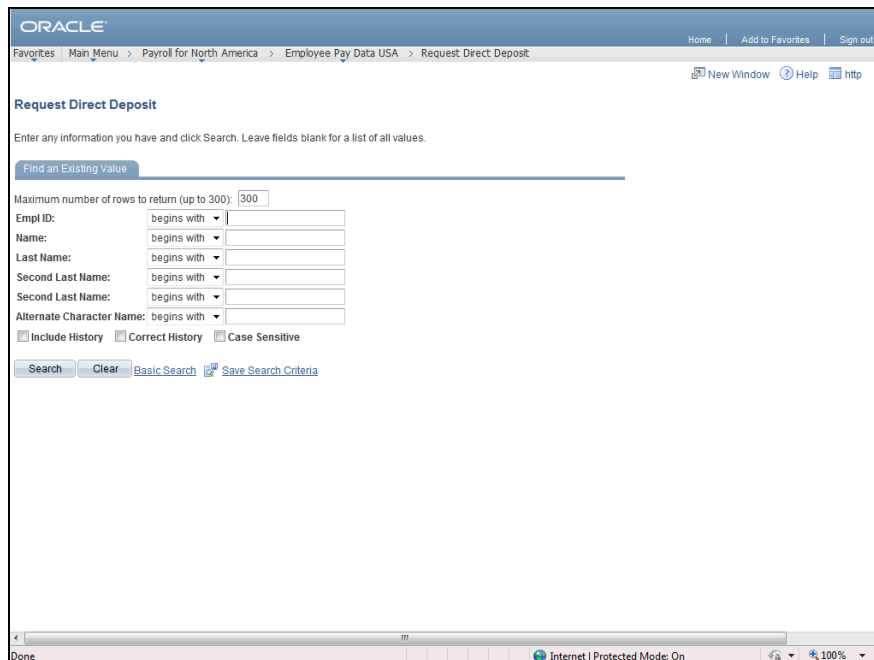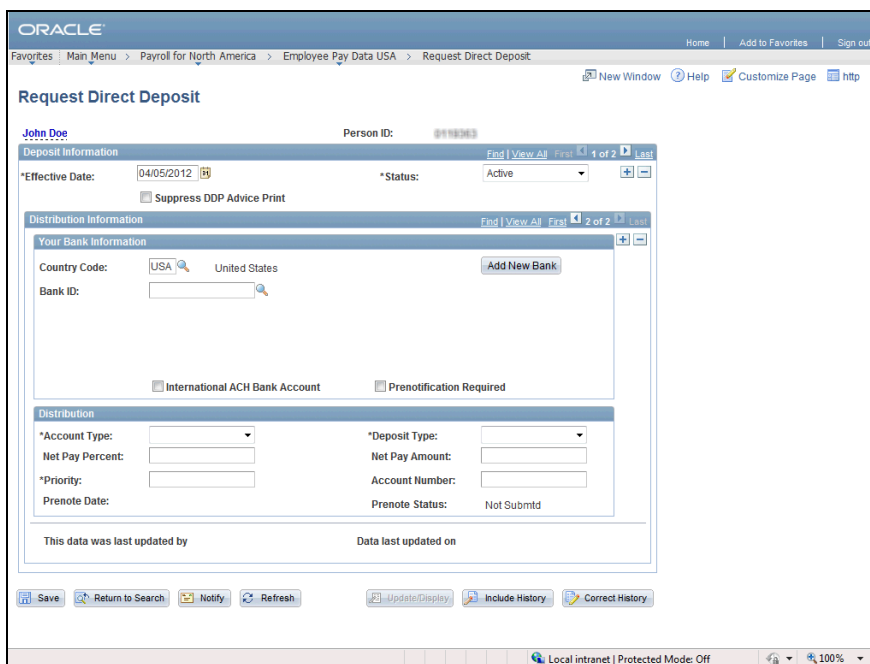
Step	Action
5.	Enter the desired information into the Empl ID field. Enter "0000000".
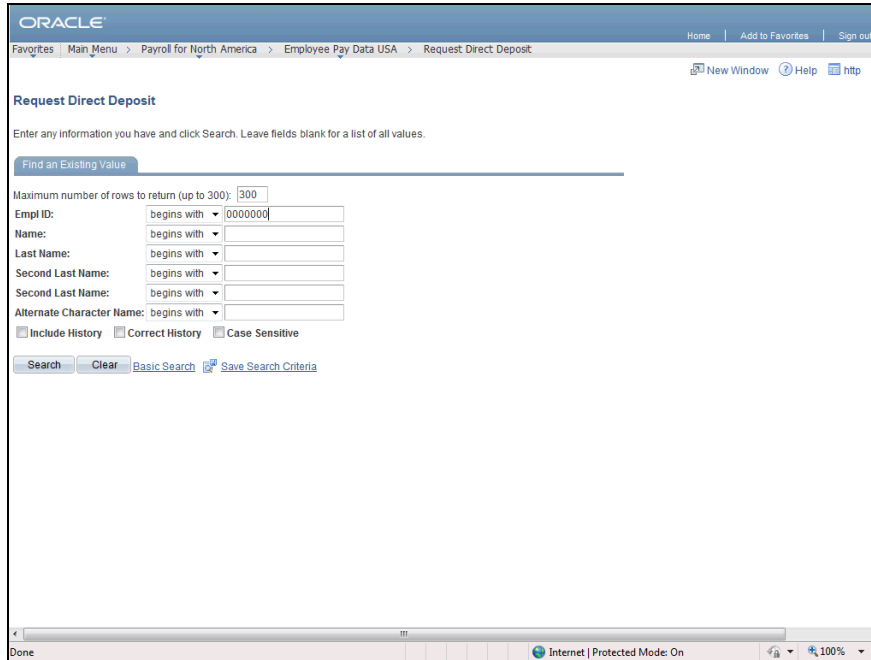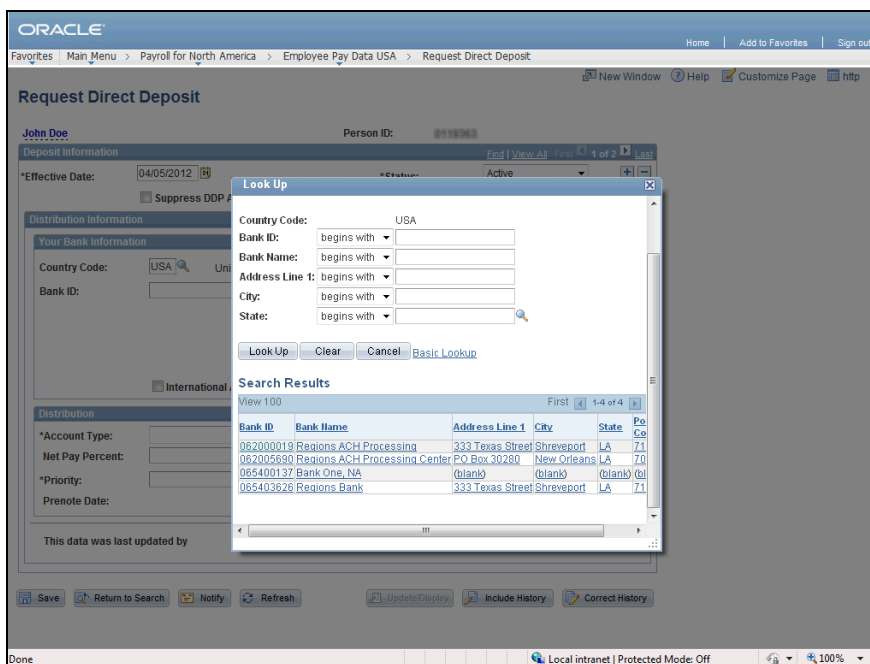
Step	Action
6.	Click the Search button.
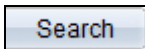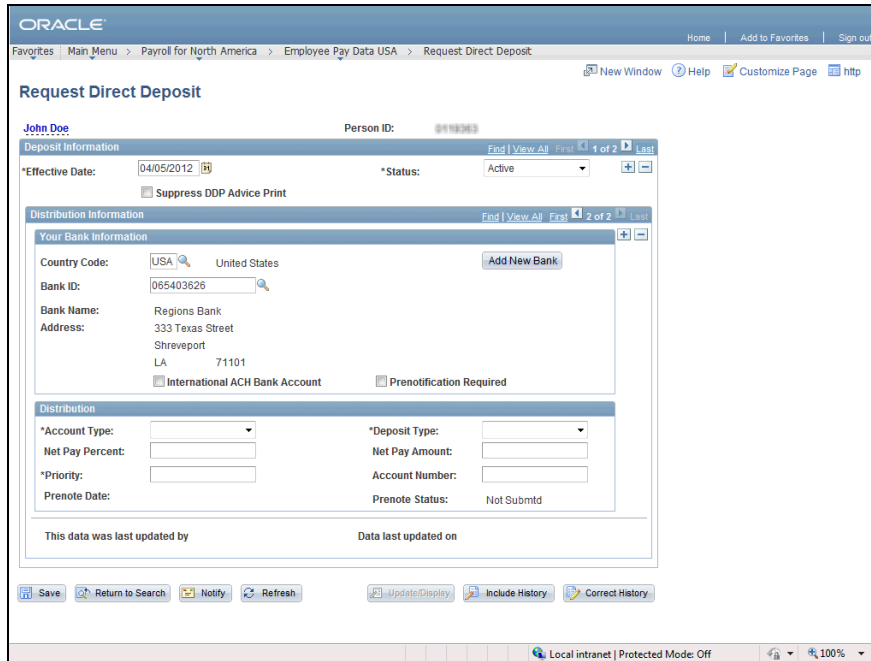
Step	Action
7.	Enter the **Bank ID** or click the Bank ID lookup icon and select an option from the list.
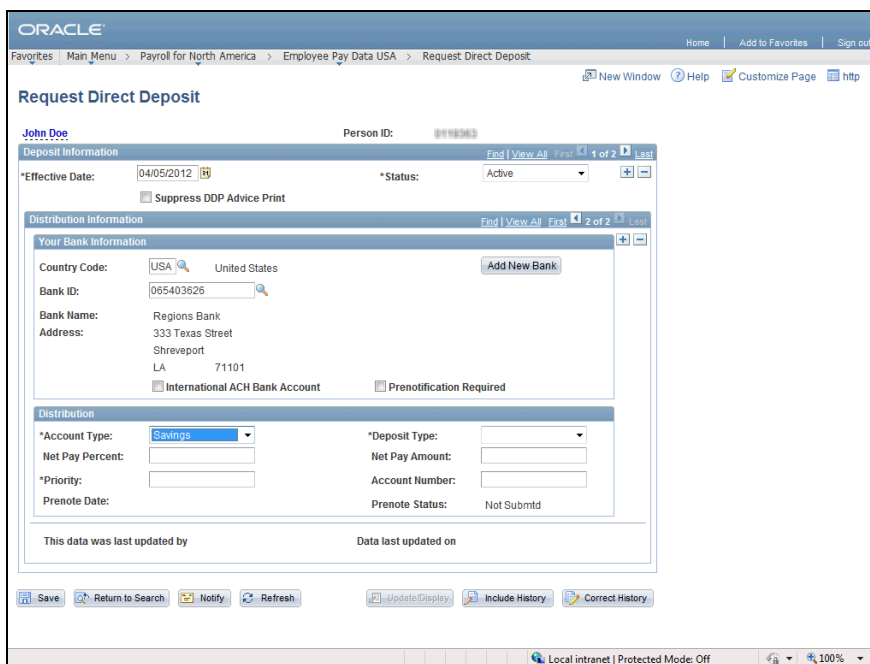
Step	Action
8.	Click the Regions Bank link. Regions Bank

Step	Action
9.	Click the drop-down arrow and select an **Account Type** from the list. Click the **Savings** list item. ▼

Step	Action
10.	Click the Deposit Type drop-down arrow and select a deposit type from the list. ▼
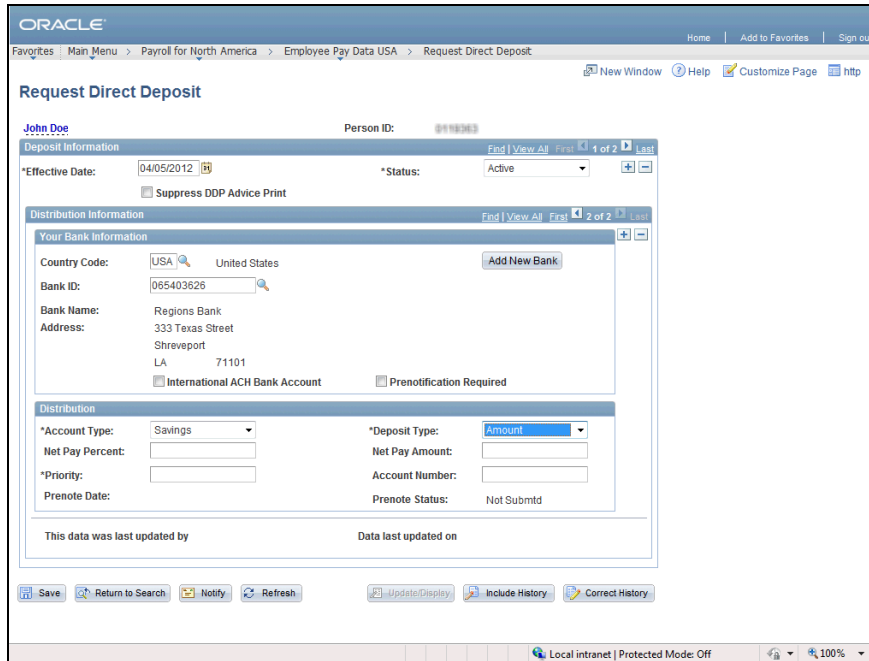
Step	Action
11.	Click the Amount list item. Amount

Step	Action
12.	Enter the desired information into the Net Pay Amount field. Enter "200.00".

Step	Action
13.	Enter the desired information into the Account Number field. Enter "125469872".

Step	Action
14.	Enter the desired information into the Priority field. Enter "500".

Step	Action
15.	Click the Save button.

Step	Action
16.	This completes the topic on Record Direct Deposit. **End of Procedure.**

Record a Garnishment

Procedure

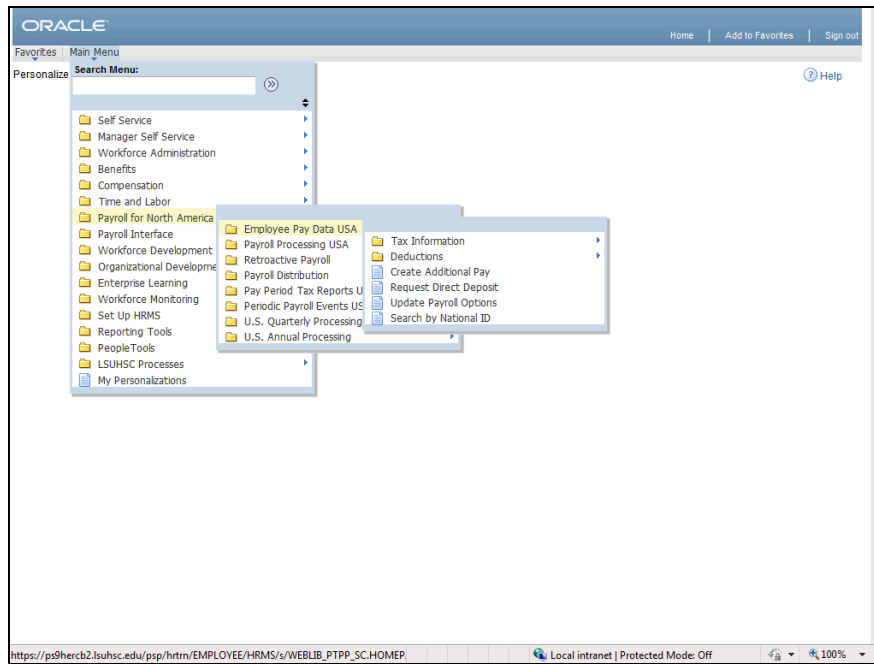In this topic you will learn how to **Record a Garnishment**.

Step	Action
1.	Click the Main Menu button. Main Menu
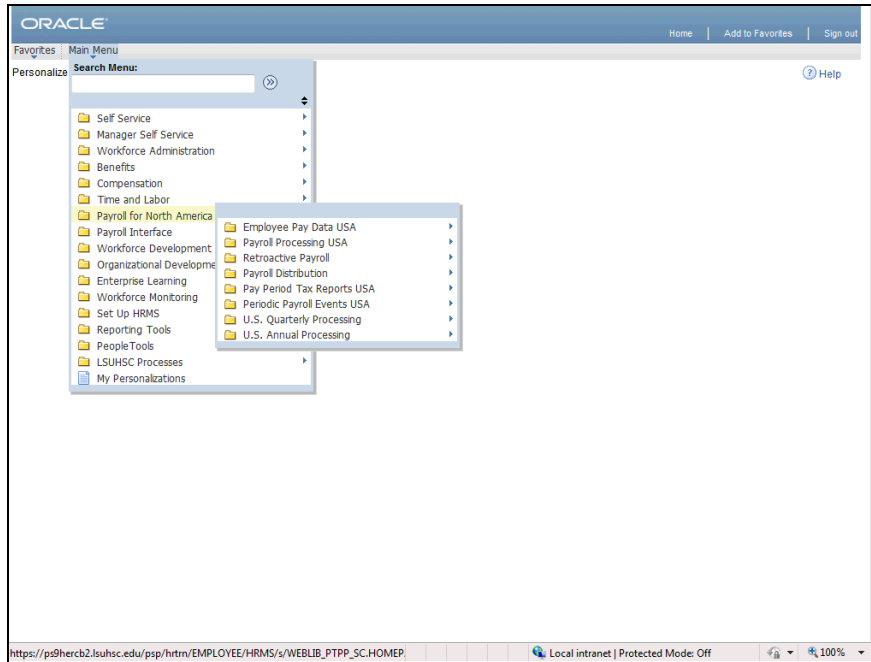
Step	Action
2.	Point to the Payroll for North America menu.
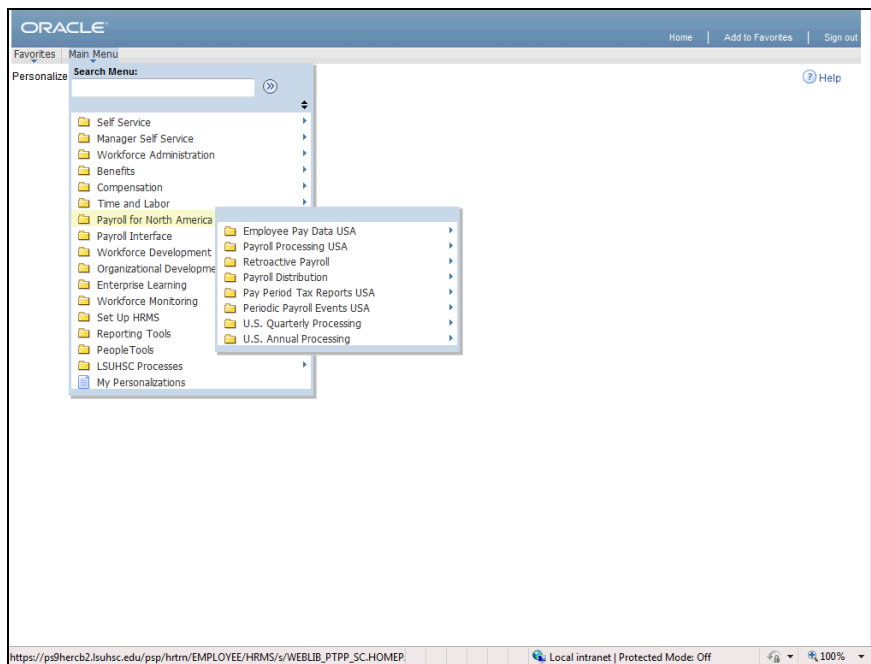
Step	Action
3.	Point to the Employee Pay Data USA menu.
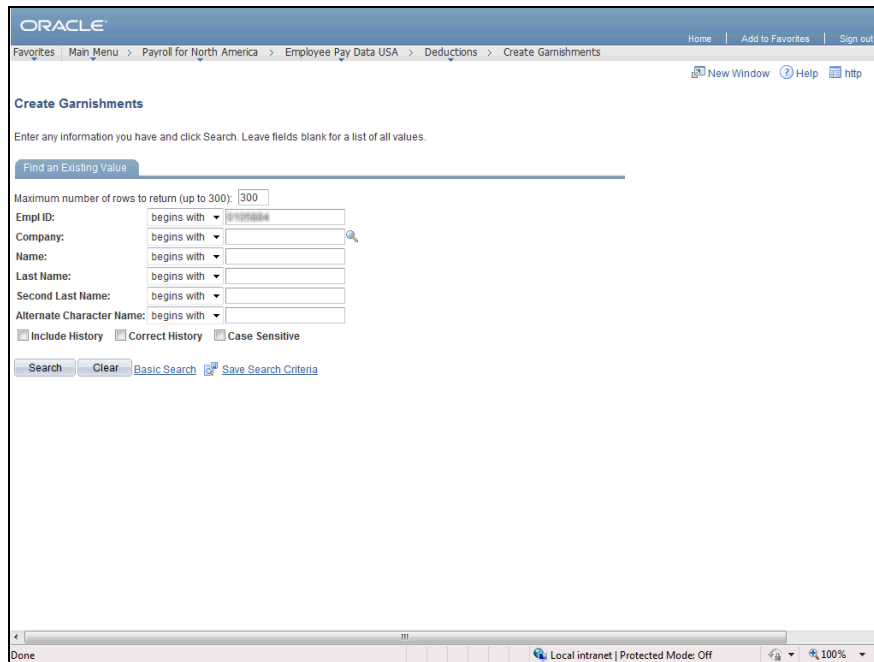
Step	Action
4.	Point to the Deductions menu.
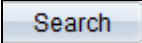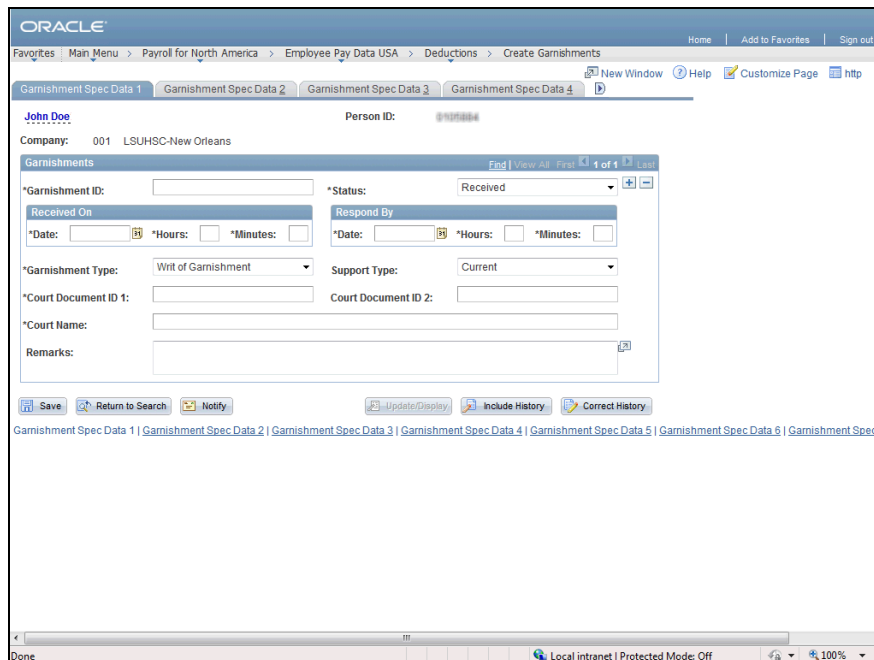
Step	Action
5.	Click the Create Garnishments menu.
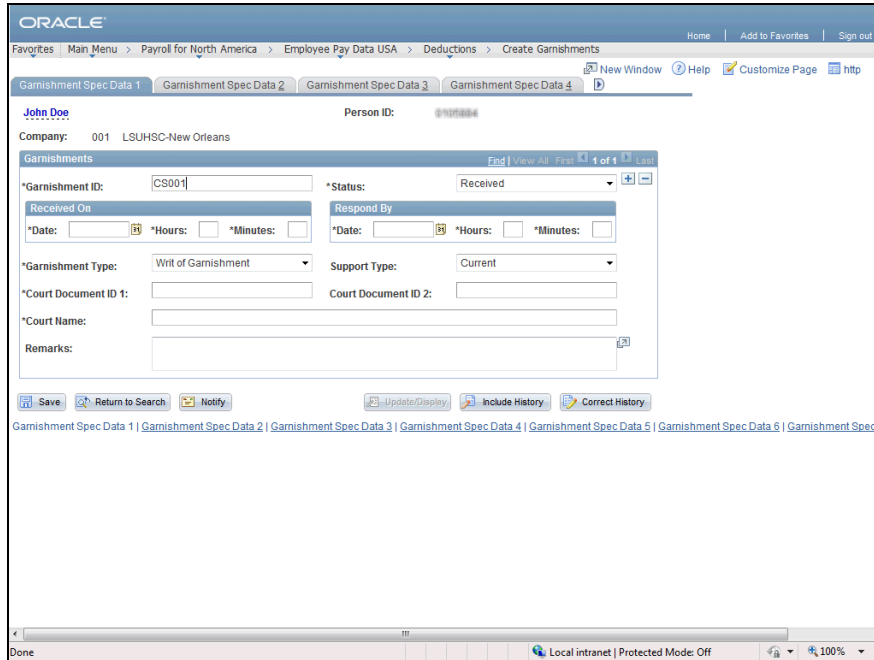
Step	Action
6.	Enter the desired information into the Empl ID field. Enter "0000000".
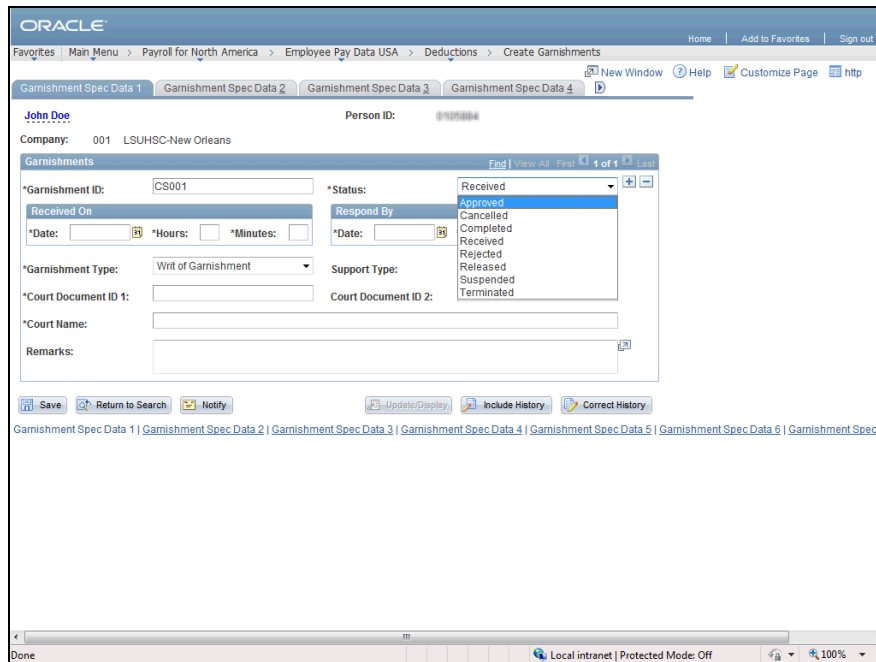
Step	Action
7.	Click the **Search** button.

Step	Action
8.	Enter the desired information into the **Garnishment ID** field. Enter "**CS001**".

Step	Action
9.	Click the drop-down arrow to the right of the **Status** field.

Step	Action
10.	Select an option from the drop-down list. Click the **Approved** list item. Approved

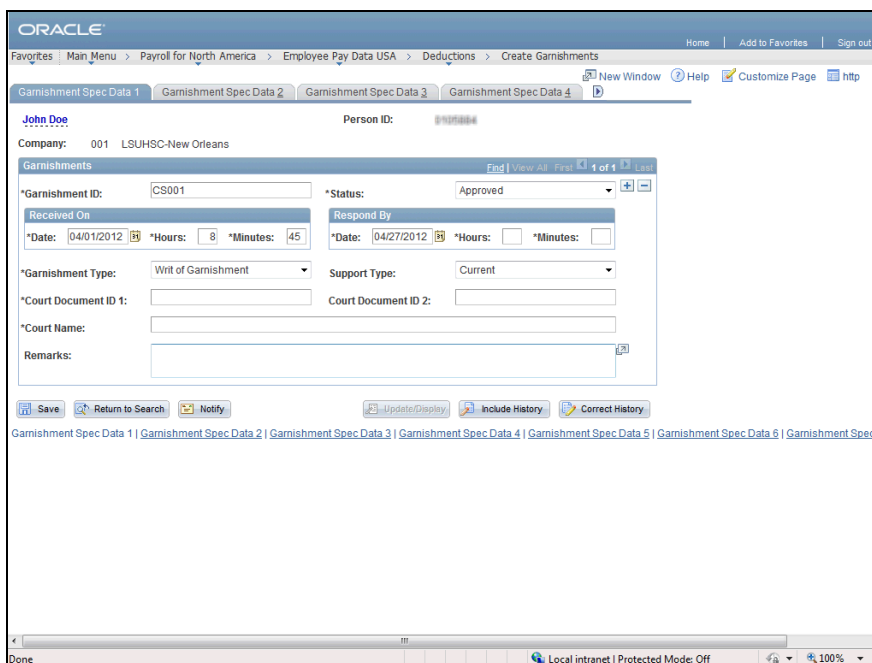| Step	Action
11.	Click in the **Received Date** field to enter the Received Date or click the Calendar icon to select a date. **Note:** Enter the date the garnishment was received, not the date you are entering it into the system.

Step	Action
12.	Enter the hour and minutes the garnishment was received, not the time you are entering it into the system. **Received Time** field. Enter "**8:45**".

Step	Action
13.	Enter the **Respond by Time** hour and minutes into the desired fields. Enter "11:30".

Step	Action
14.	Click the Garnishment Type drop-down and select an option from the list.

Step	Action
15.	Click the drop-down to the right of the **Garnishment Support Type** field.

Step	Action
16.	Select a **Garnishment Support** Type from the drop-down list. Click the **Current** list item.

Step	Action
17.	Enter the desired information into the Court Document ID 1 field. Enter "CS-15550".
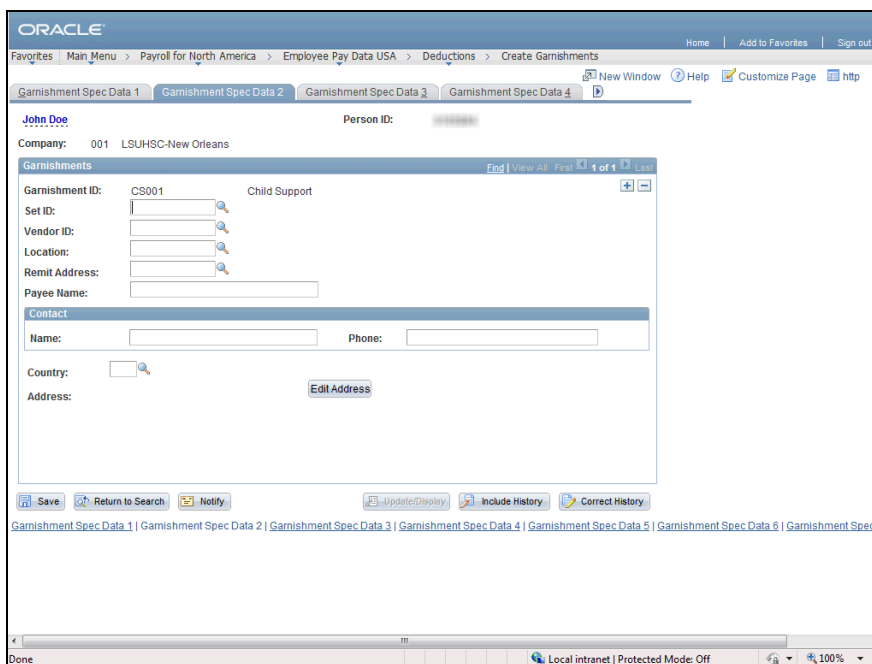
Step	Action
18.	Enter the desired information into the Court Name field. Enter "Juvenile Court Child Support".

Step	Action
19.	Enter comments as needed in the Remarks field.

Step	Action
20.	Click the **Garnishment Spec Data 2** tab.
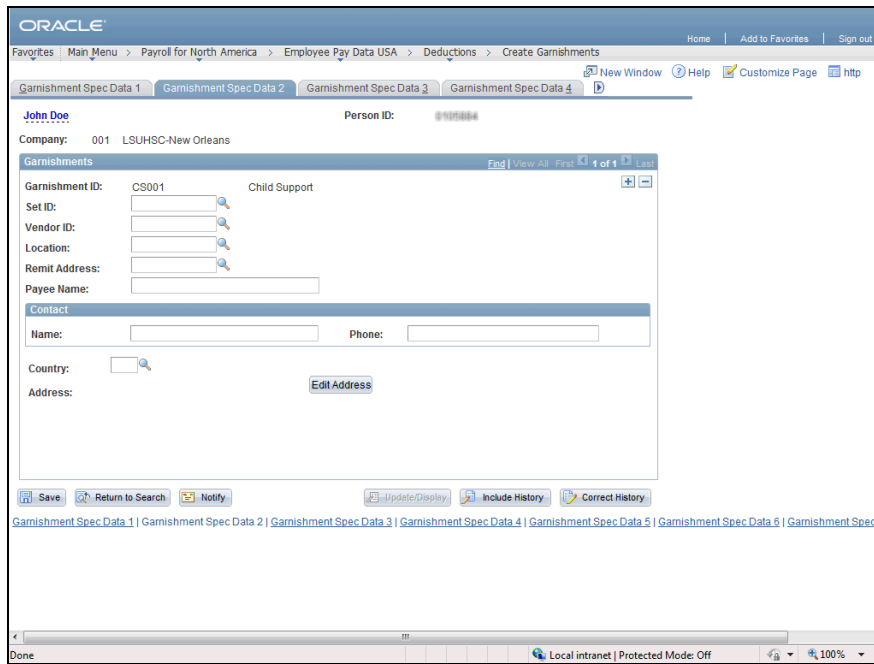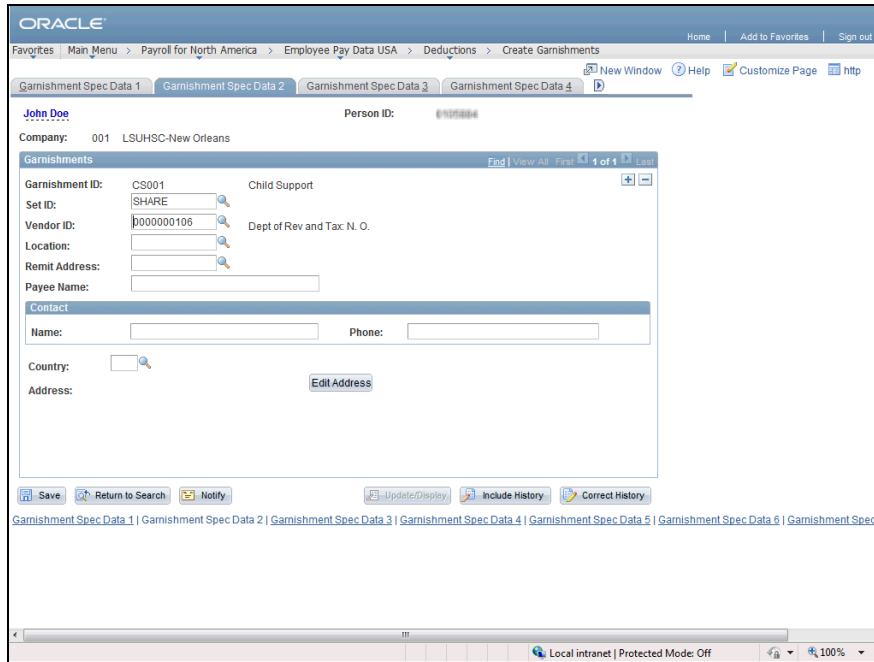
Step	Action
21.	Click the **Look up SetID** Icon
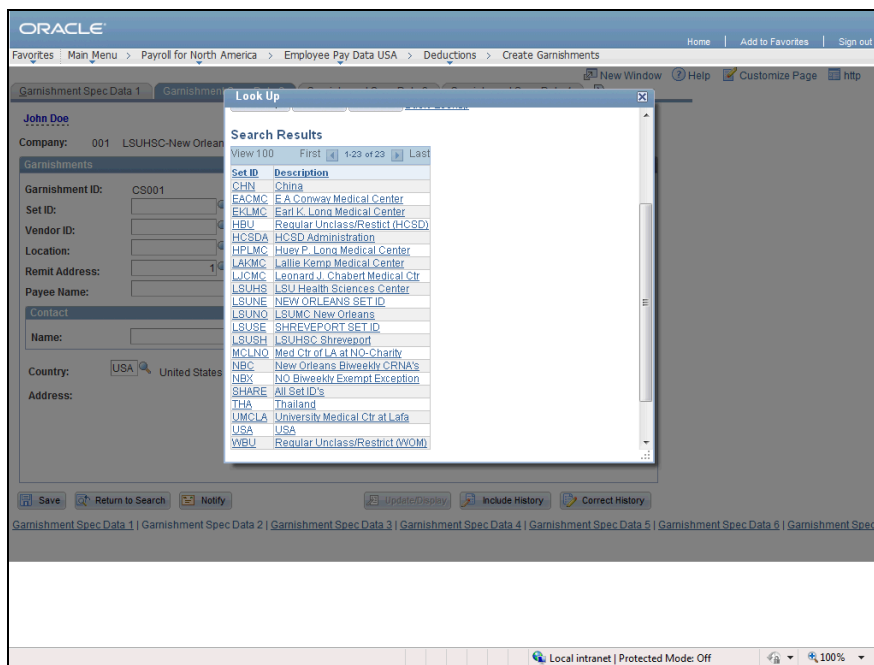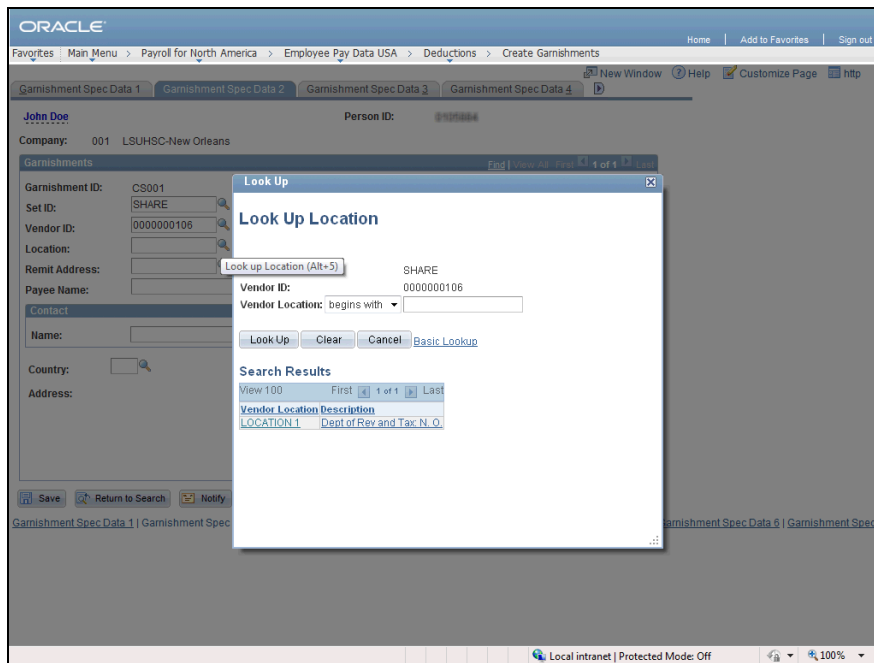
Step	Action
22.	Select SHARE from the drop-down list. SHARE
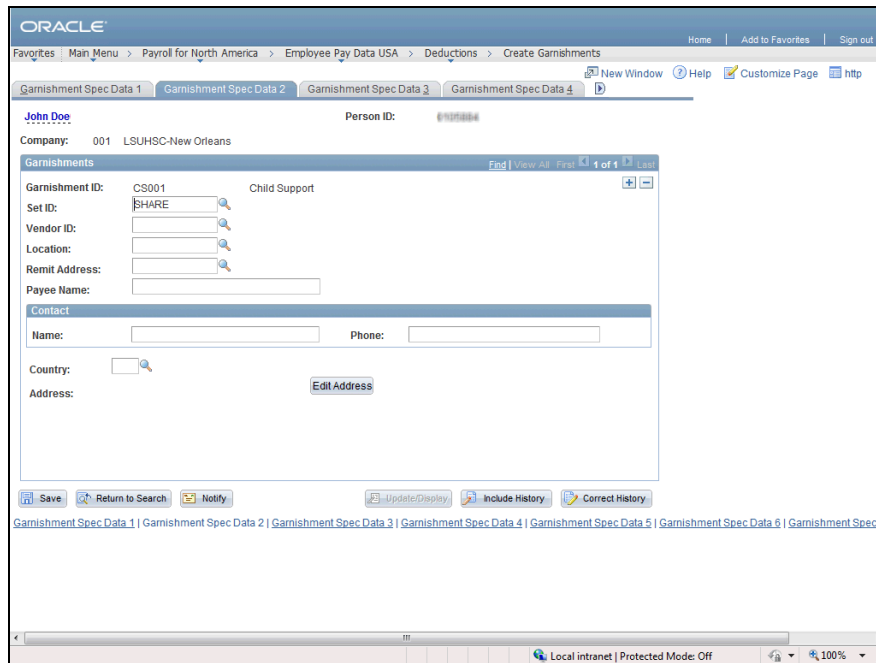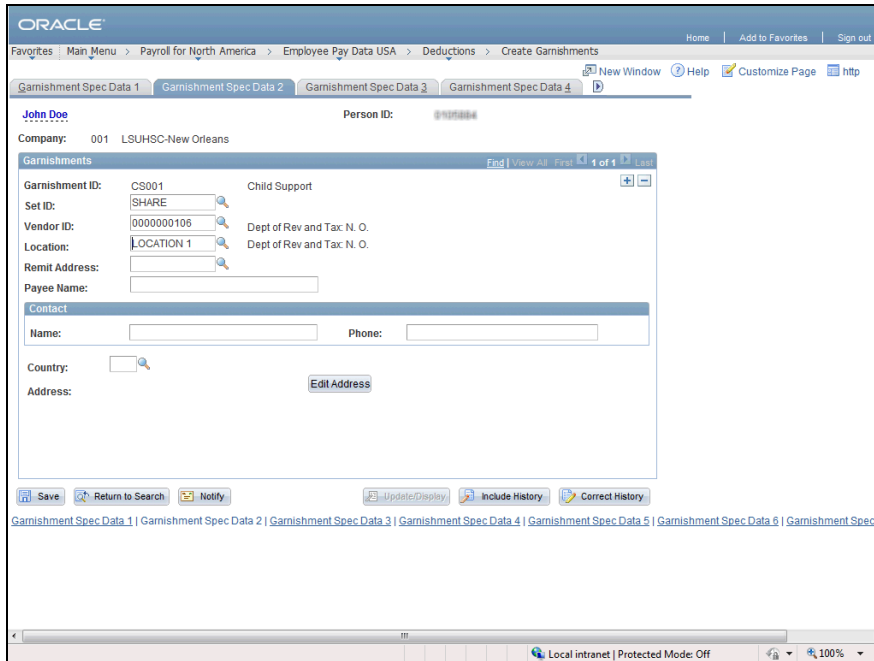
Step	Action
23.	Click the **Lookup Vendor ID** Icon.

Step	Action
24.	Click the **Look up Location** button.

Step	Action
25.	Click the LOCATION lookup button and select the Vendor Location. LOCATION 1

Step	Action
26.	Click the **Look up Remit Address** button.
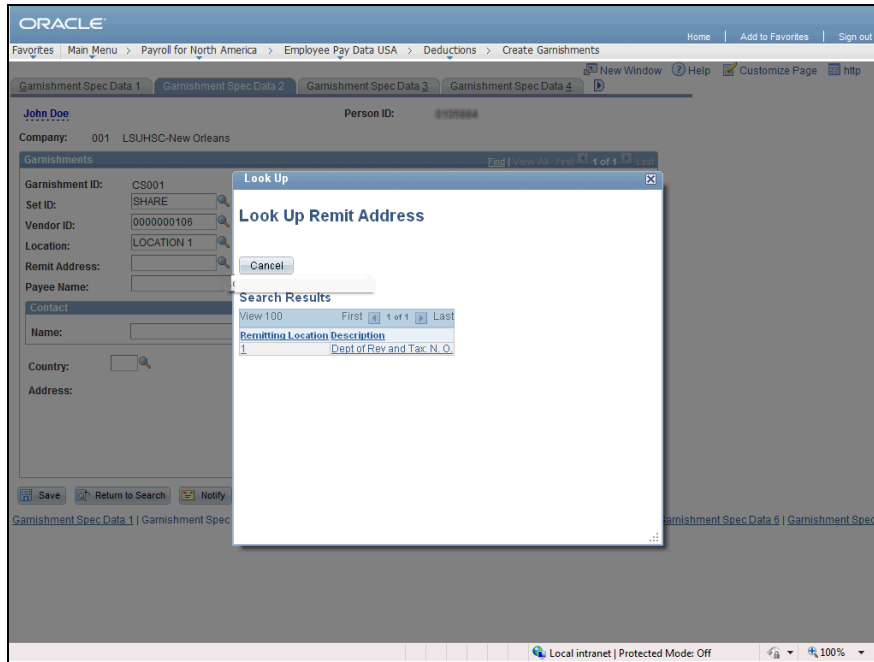
Step	Action
27.	Select the Remitting Location Dept of Rev and Tax: N. O. link.
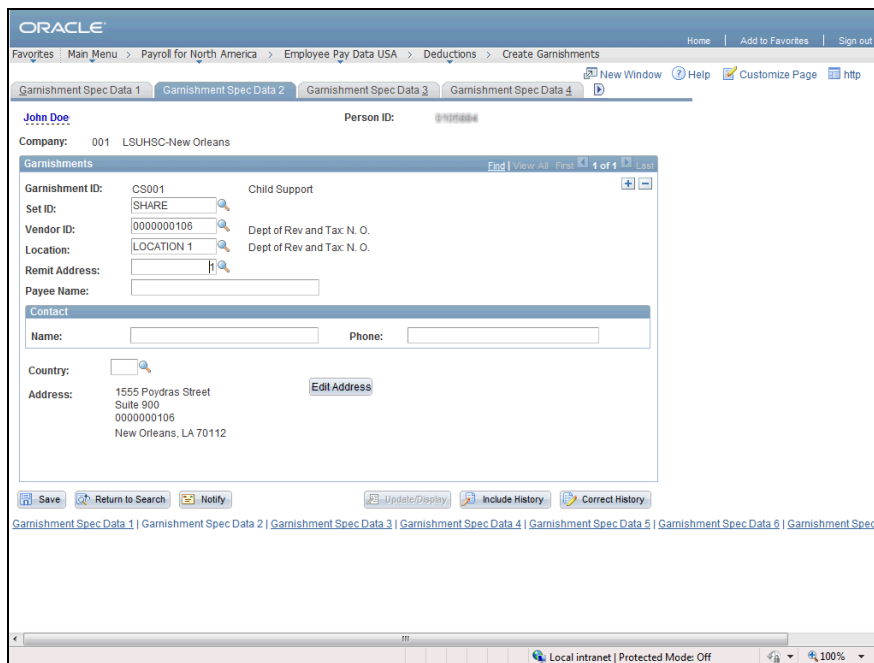
Step	Action
28.	Enter the desired information into the Name field. Enter "Mary Jane Doe".
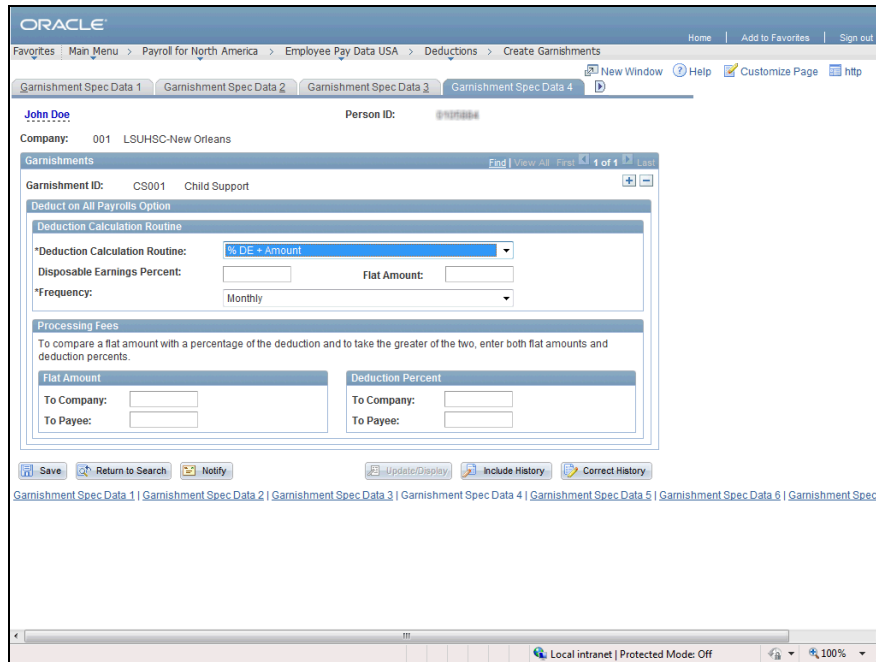
Step	Action
29.	Enter the desired information into the Phone field. Enter "504-555-1111".
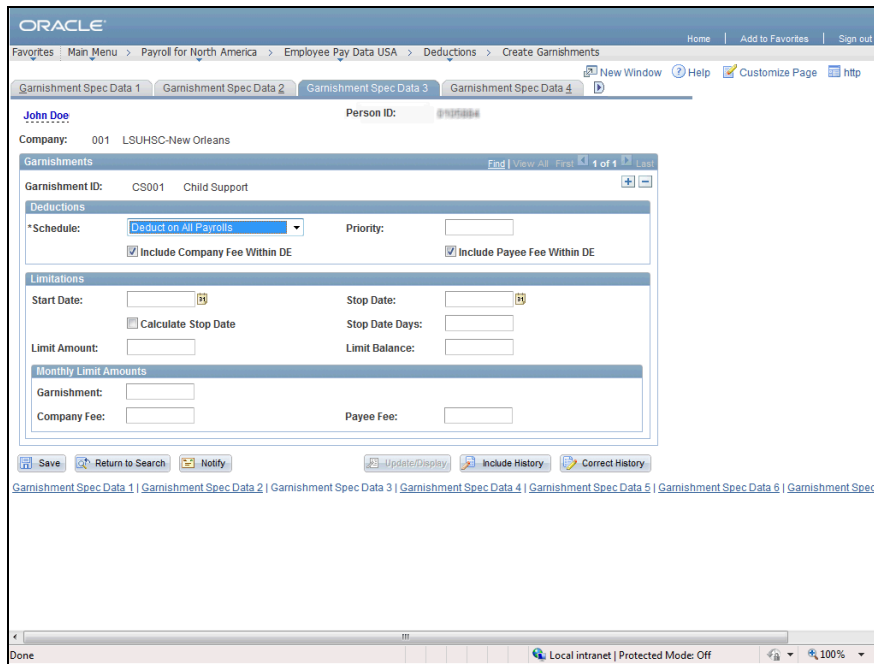
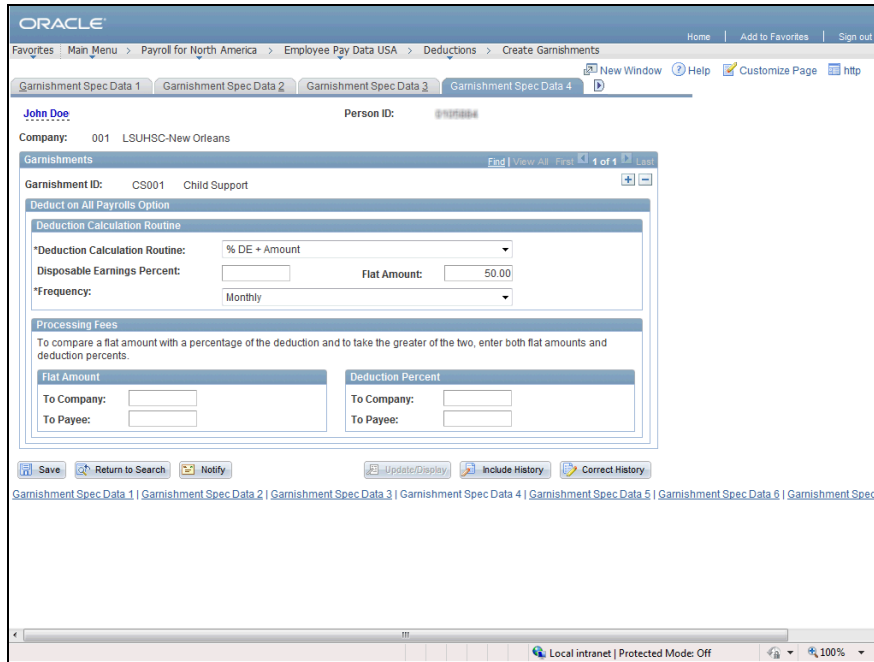| Step	Action
30.	Click the **Garnishment Spec Data 4** link. *Note: The Garnishment Spec Data 4 can be selected from the tab at the top of the screen or from the Link at the bottom of the screen.* Garnishment Spec Data 4
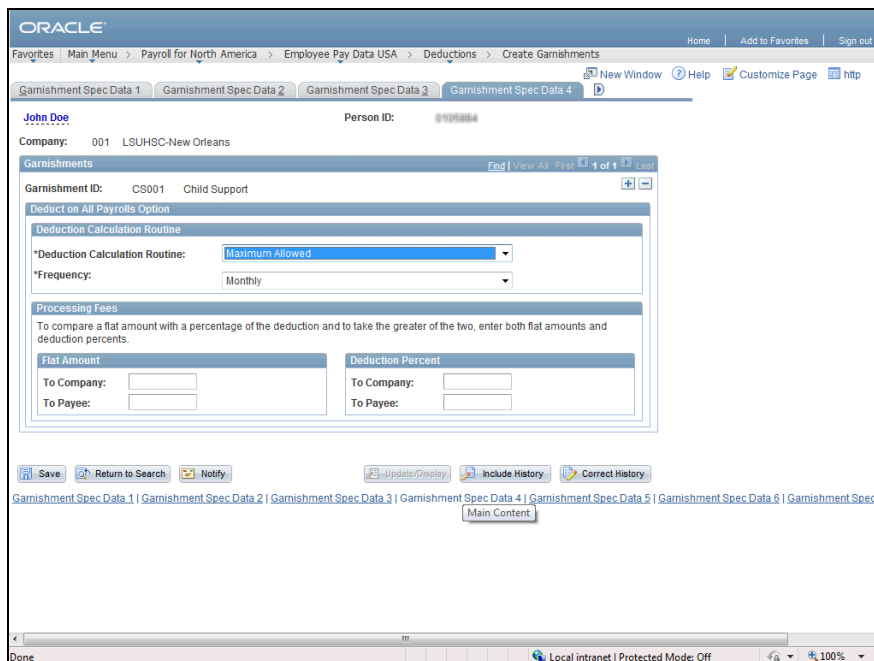
Step	Action
31.	Click the Deduction Calculation Routine drop-down and select **% DE + Amount** from the drop-down list.
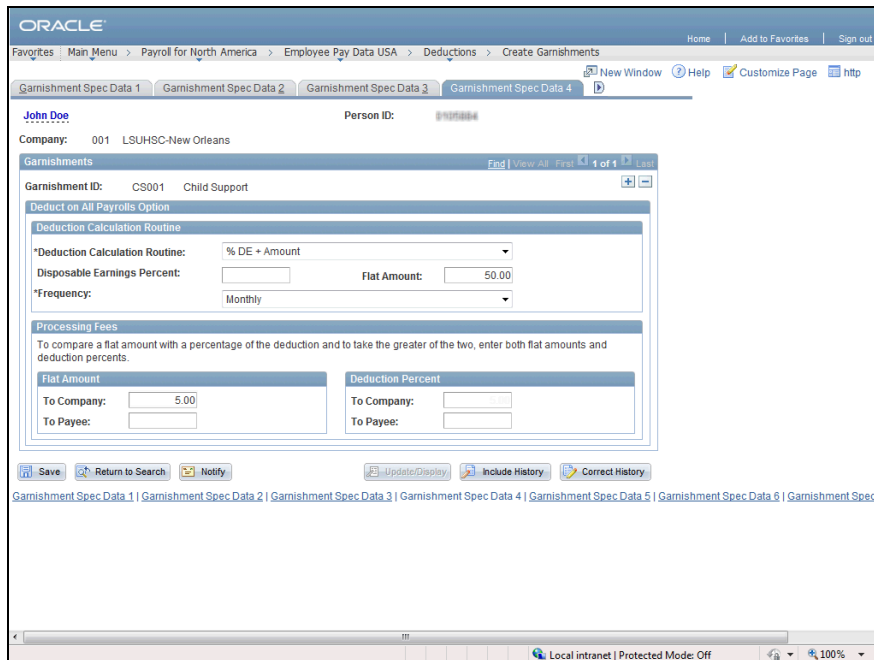
Step	Action
32.	Enter the desired information into the **Flat Amount** field. Enter "**50.00**".
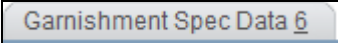
Step	Action
33.	To record Processing Fees Defaults, enter the desired information into the **To Company Flat Amount** field. Enter "**5.00**".

Step	Action
34.	Click the Show following tabs button to display additional tabs.
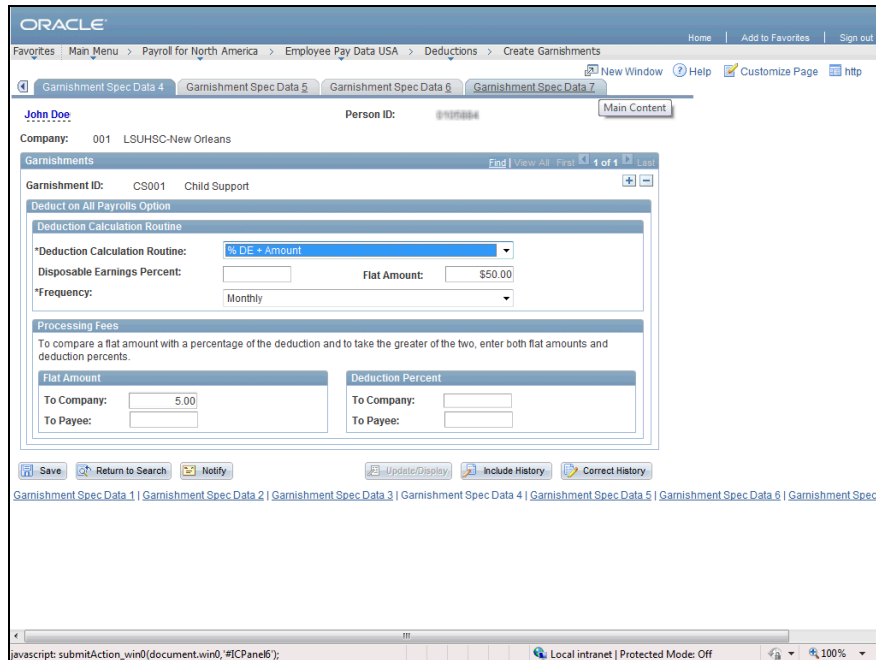
Step	Action
35.	Click the **Garnishment Spec Data 6** tab.
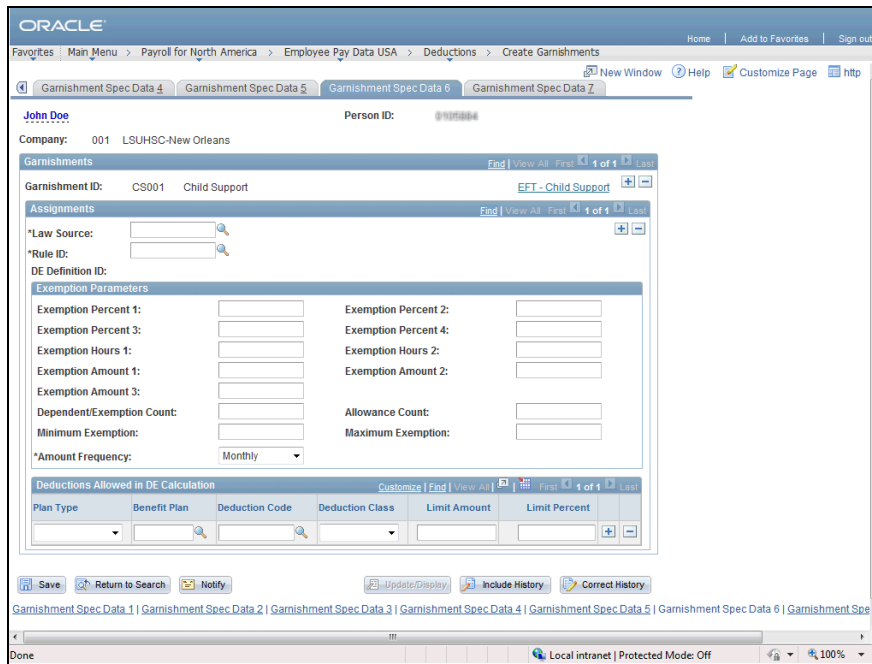
Step	Action
36.	Click the Look up Law Source button.
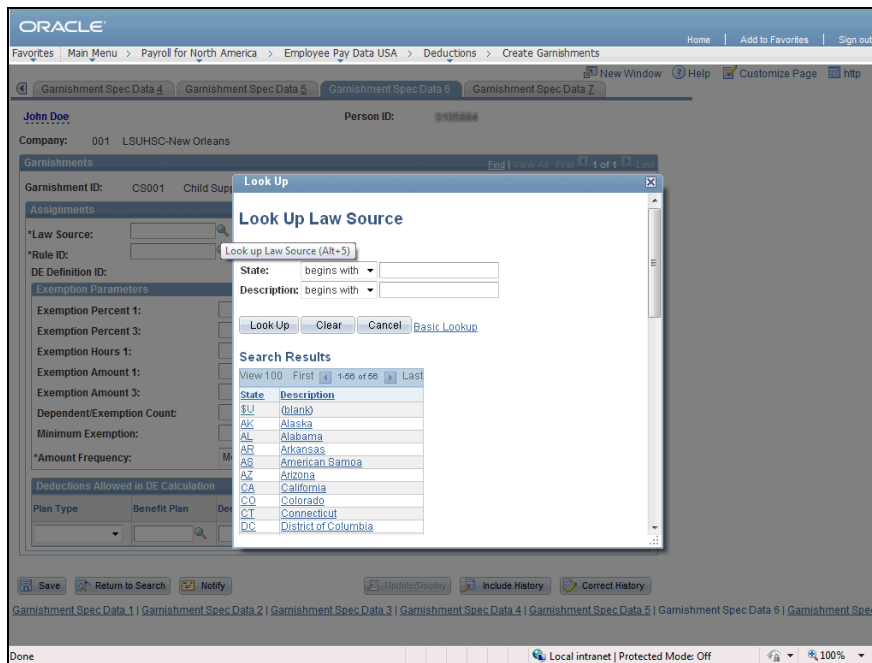
Step	Action
37.	Only two (2) options are available Law Source: **$U** and **LA.** Click the **LA - Louisiana** link.
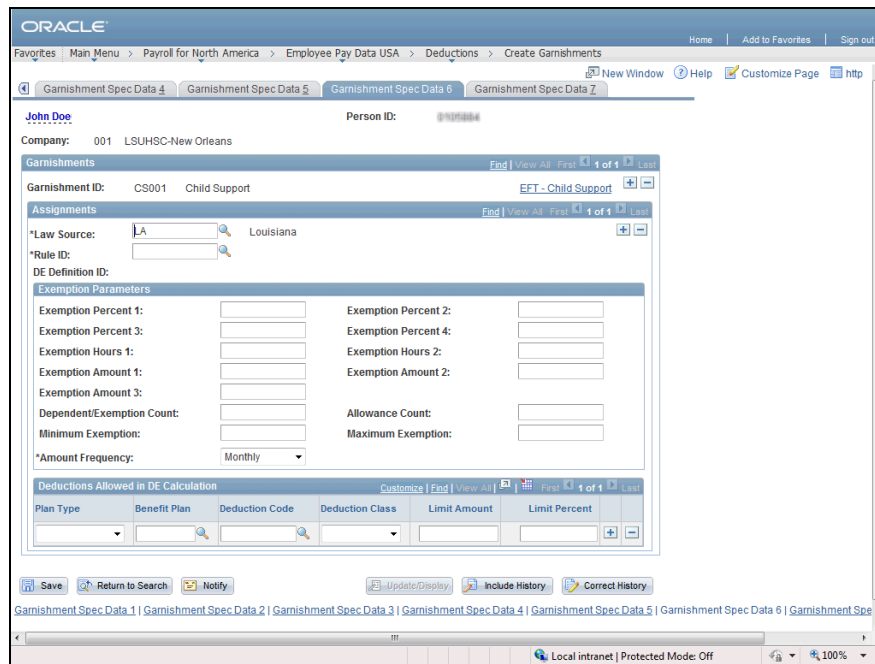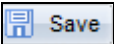
Step	Action
38.	Click the **Look up Rule ID** button.

Training Guide
Payroll Training Guide LSUNO V9.1
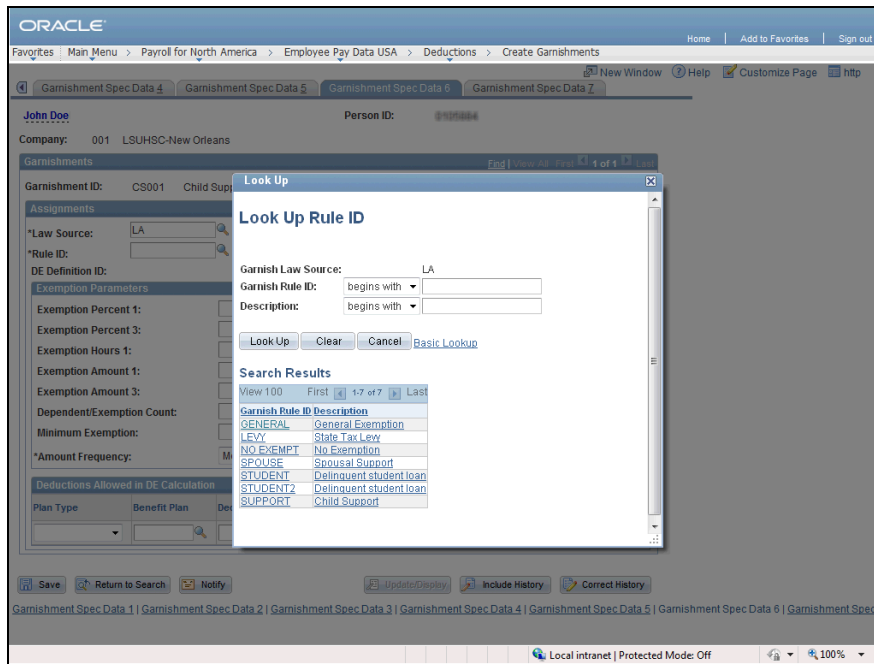
Step	Action
39.	Click the SUPPORT link. SUPPORT

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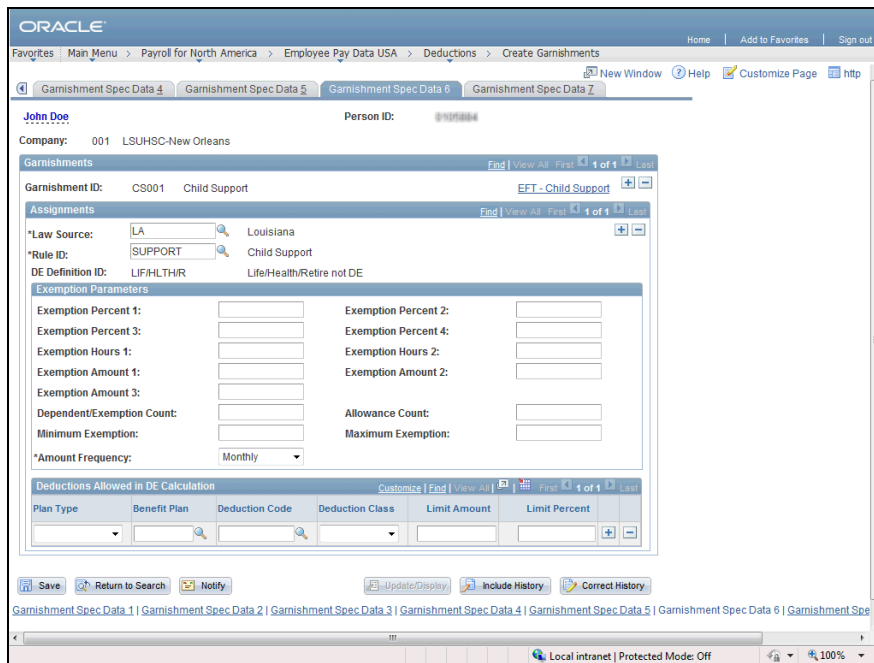
Step	Action
40.	Click the **Save** button.
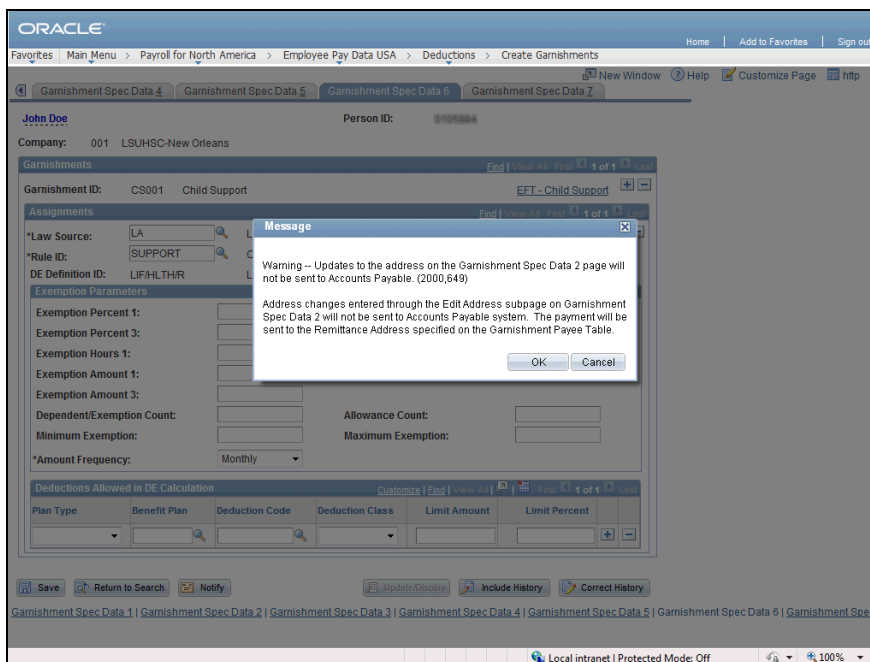
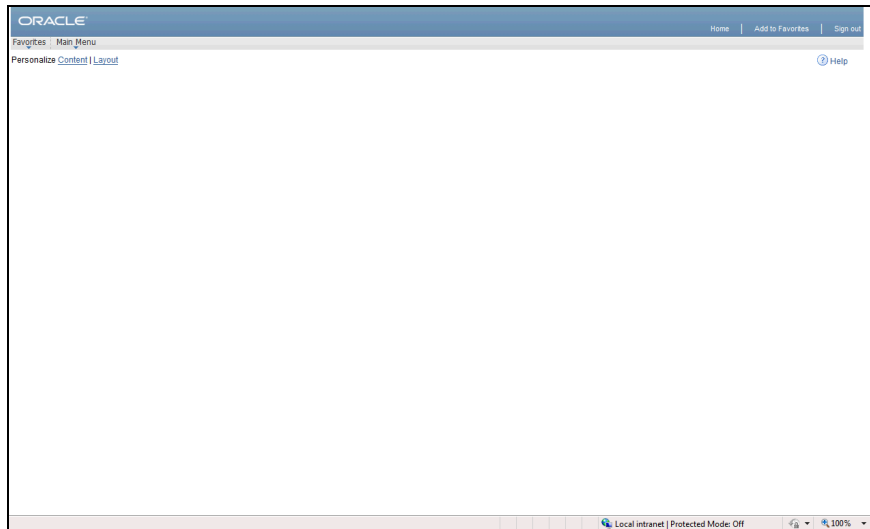| Step	Action
41.	Click the **OK** button.
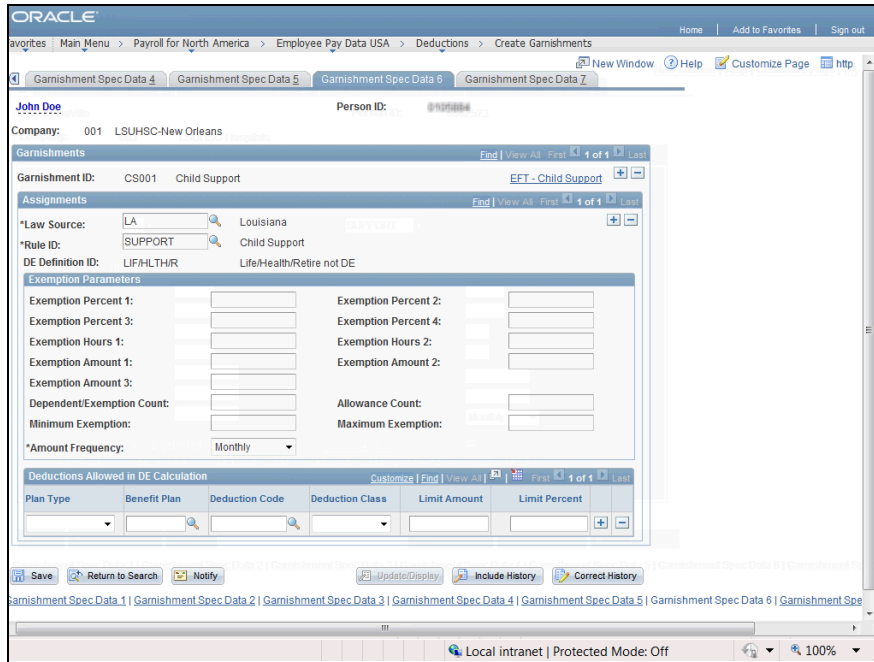
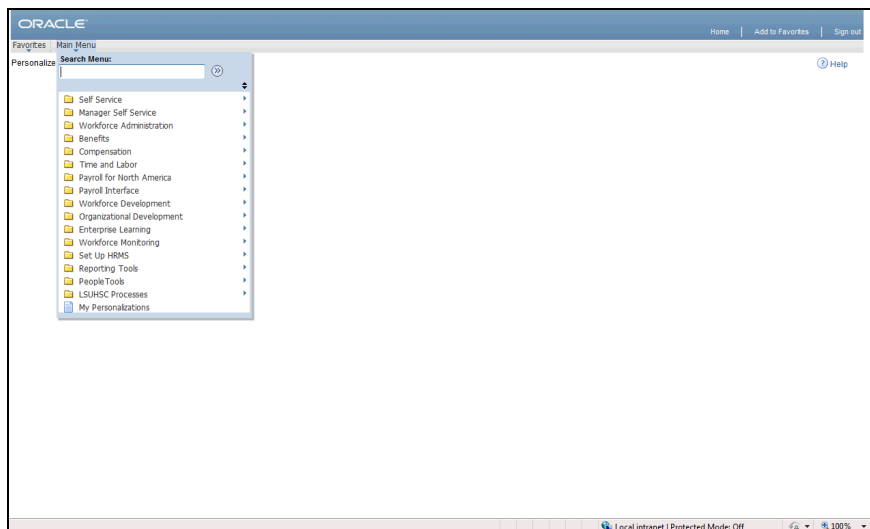| Step	Action
42.	This completes the topic on **Record a Garnishment**. **End of Procedure.**

Payroll Processing

View Paycheck Data

Procedure

In this topic you will learn how to View Paycheck Data of an Employee.

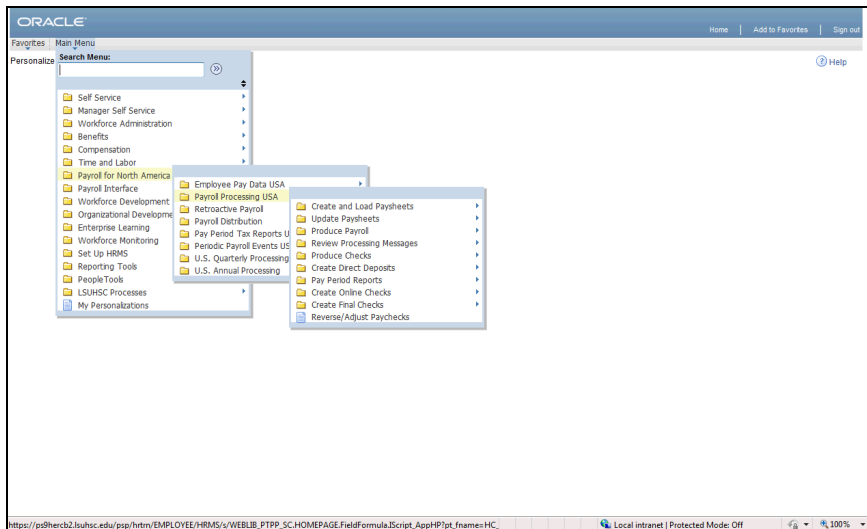| Step	Action
1.	Click the **Main Menu** button.

Step	Action
2.	Point to the Payroll for North America menu.
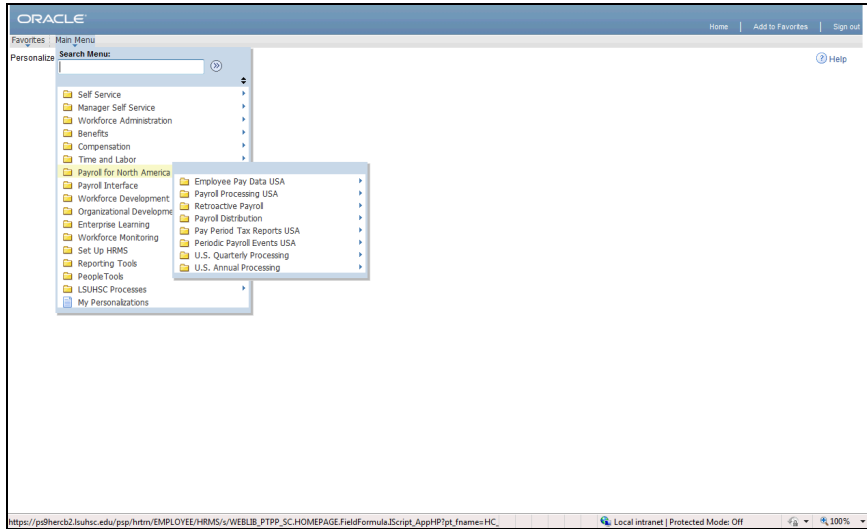
Step	Action
3.	Point to the **Payroll Processing USA** menu.
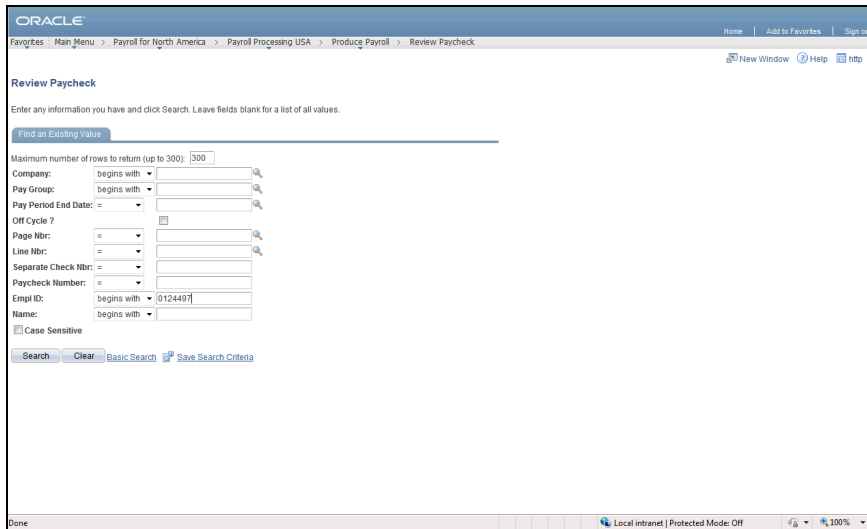
Step	Action
4.	Point to the Produce Payroll menu.
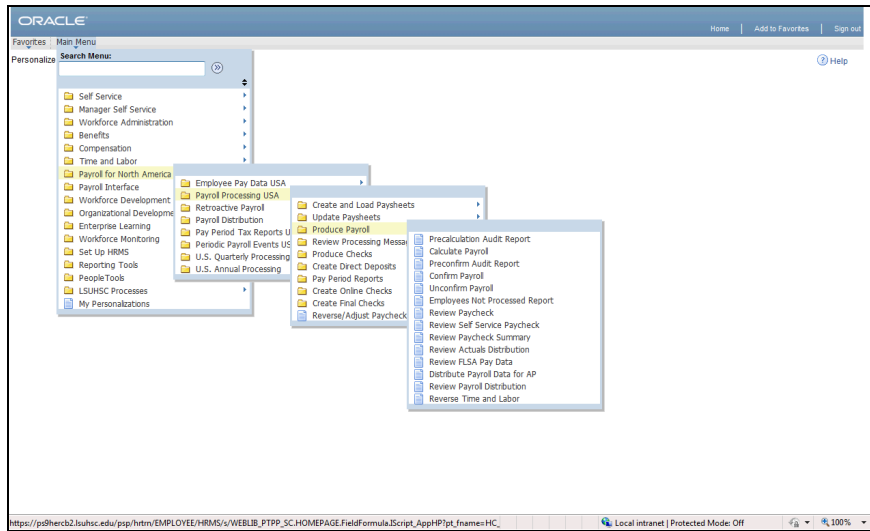
Step	Action
5.	Click the Review Paycheck menu.

Step	Action
6.	Enter the desired information into the **Empl ID** field. Enter "**0000000**".

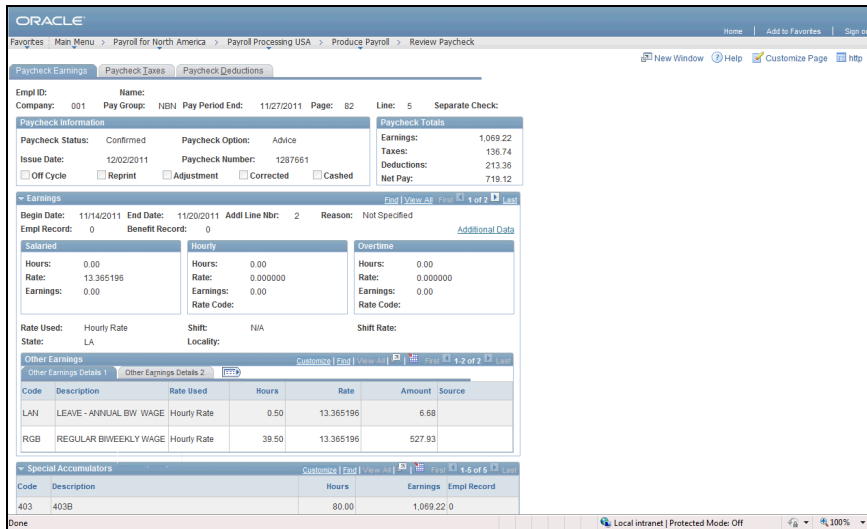| Step	Action
7.	Click the **Search** button. Search

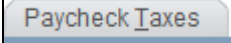| Step	Action
8.	Click the **Pay Period End Date** column header to sort the Pay Period End Date in descending order. Descending order displays the most recent Paychecks. Pay Period End Date
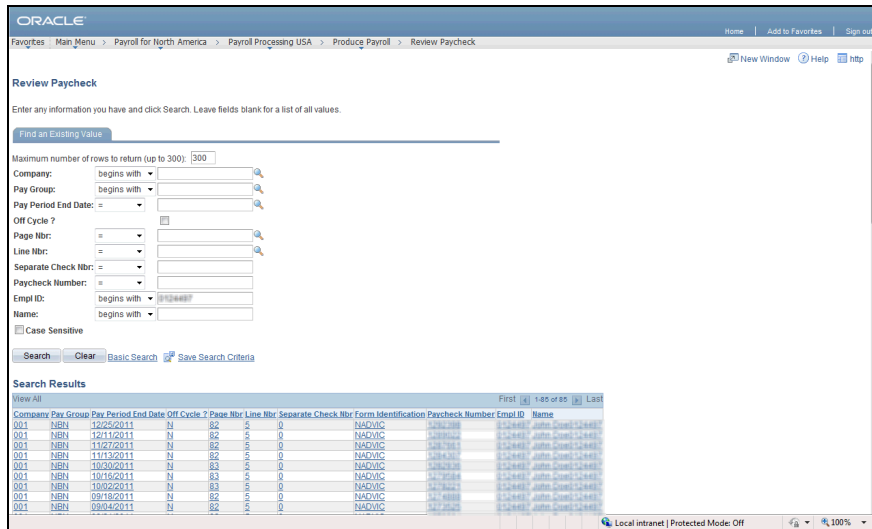
Step	Action
9.	Click the Pay Period End Date of the check you would like to review **11/27/2011** link.
	11/27/2011
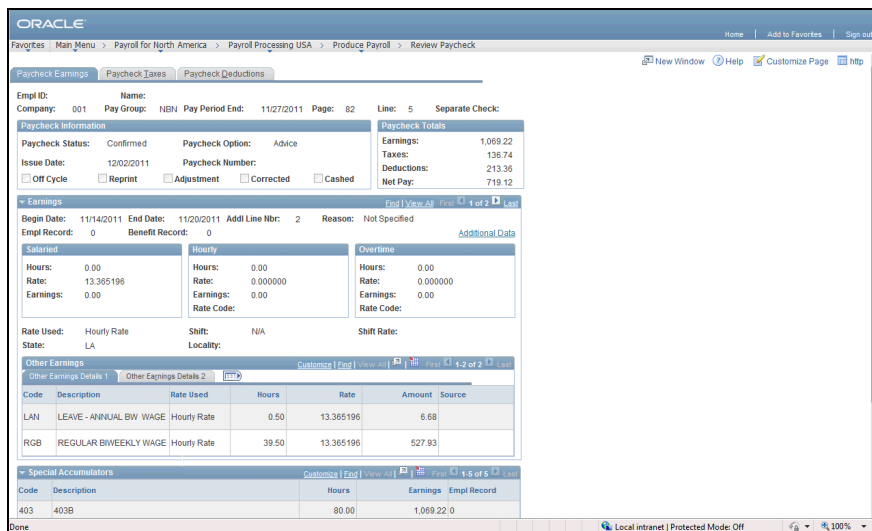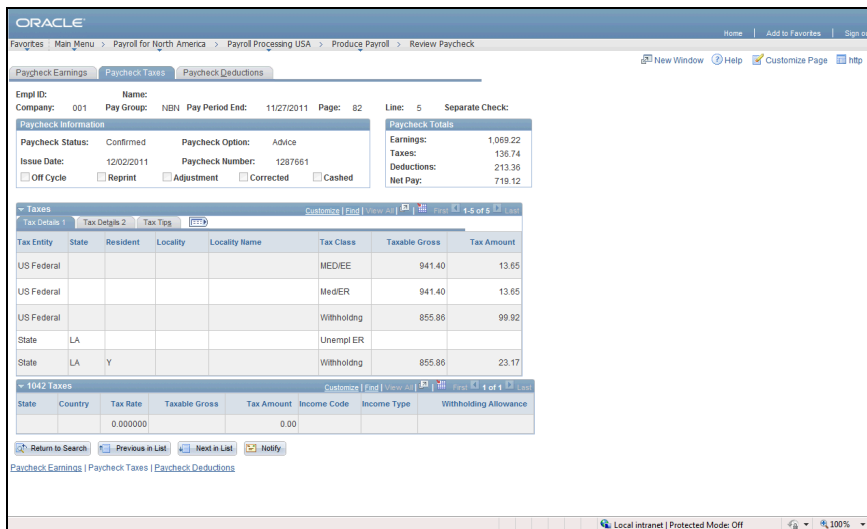
Step	Action
10.	Paycheck Earnings for the selected employee displays. Click the Other Earnings Details 2 tab to view other earnings.
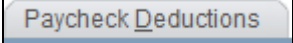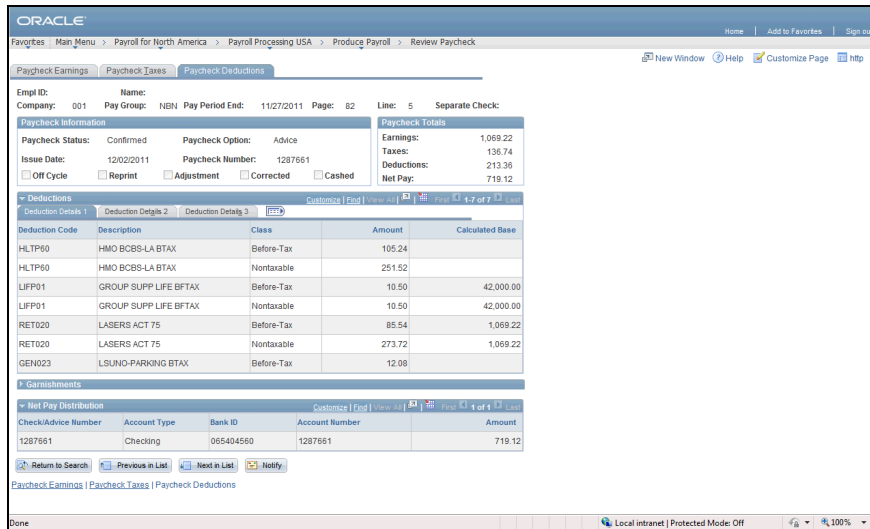
Step	Action
11.	Click the **Paycheck Taxes** tab. Paycheck Taxes

Step	Action
12.	Click the **Paycheck Deductions** tab. Paycheck Deductions

Step	Action
13.	Click the **Return to Search** button.

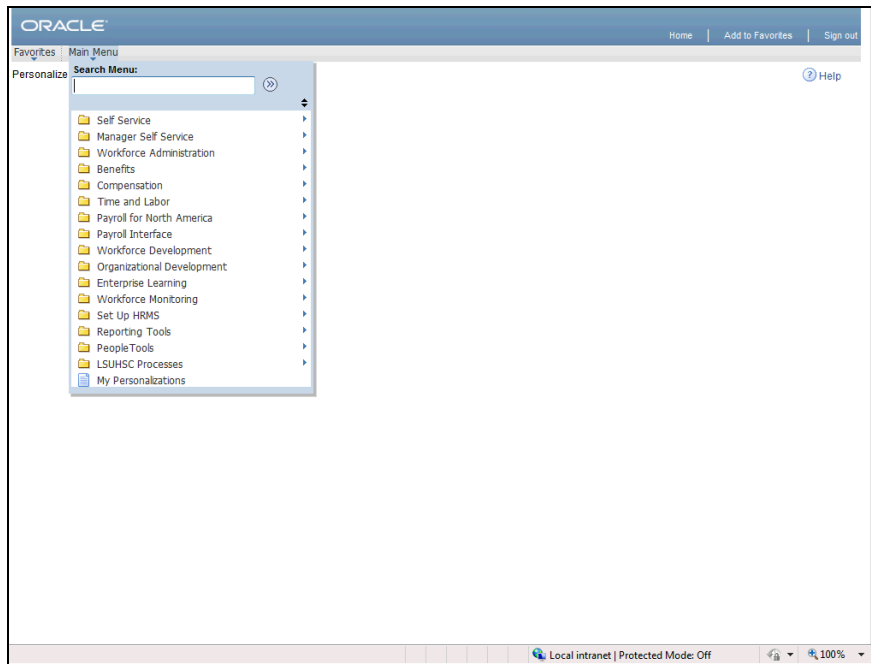| Step	Action
14.	This completes the topic on View Paycheck Data. **End of Procedure.**

View Payroll Error Messages

Procedure

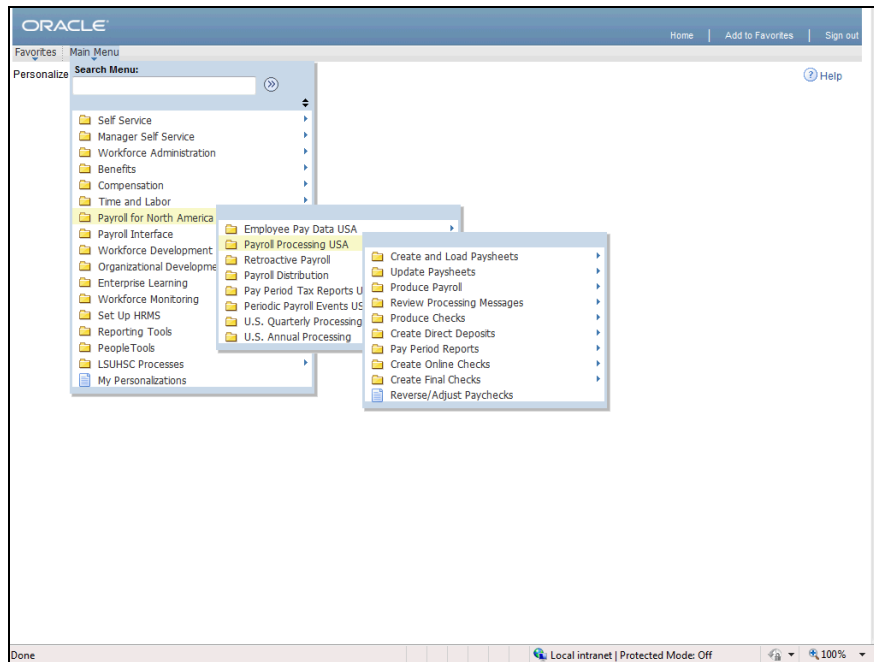In this topic you will learn now to access and review payroll error messages.
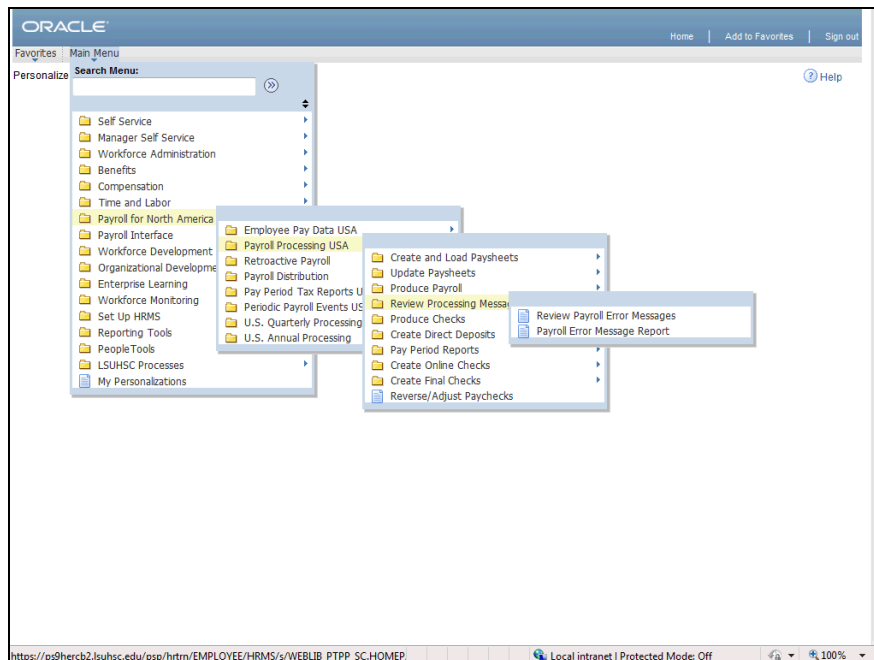

Step	Action
1.	Click the **Main Menu** button.

Step	Action
2.	Point to the **Payroll for North America** menu.
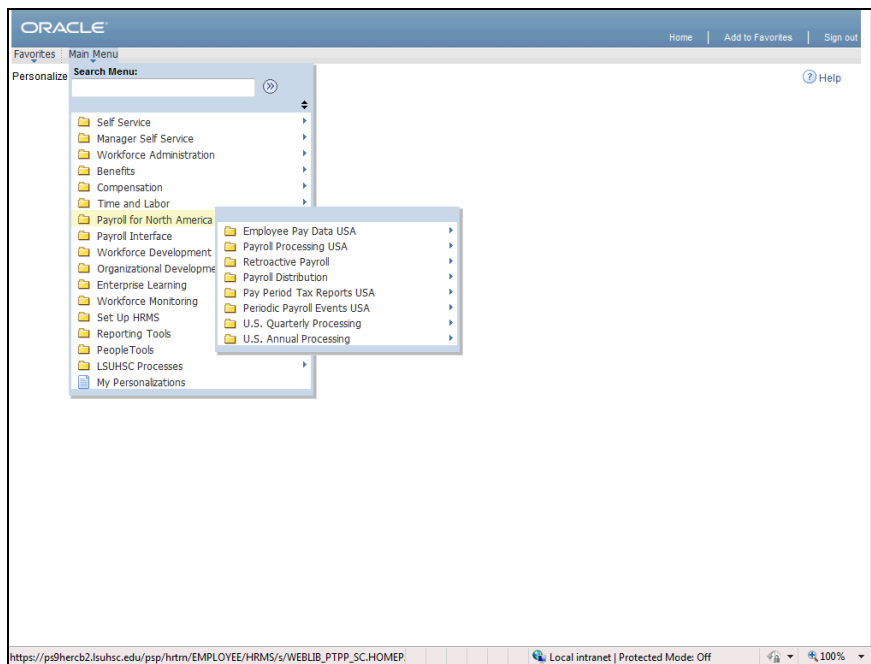
Step	Action
3.	Point to the **Payroll Processing USA** menu.

Step	Action
4.	Point to the **Review Processing Messages** menu.

Step	Action
5.	Click the **Review Payroll Error Messages** menu.

Review Payroll Error Messages
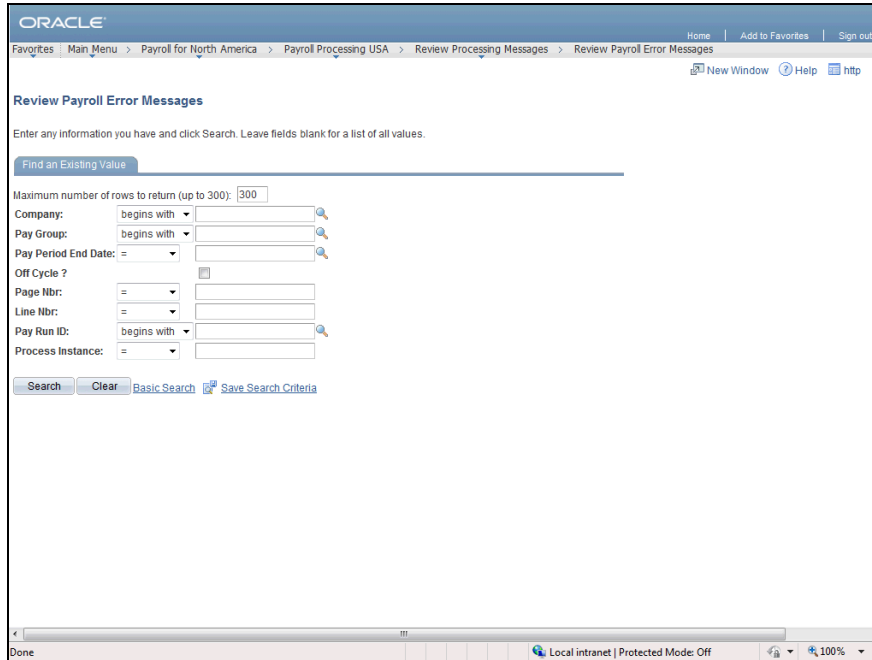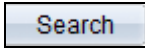
Step	Action
6.	Click the **Look up Company** button.
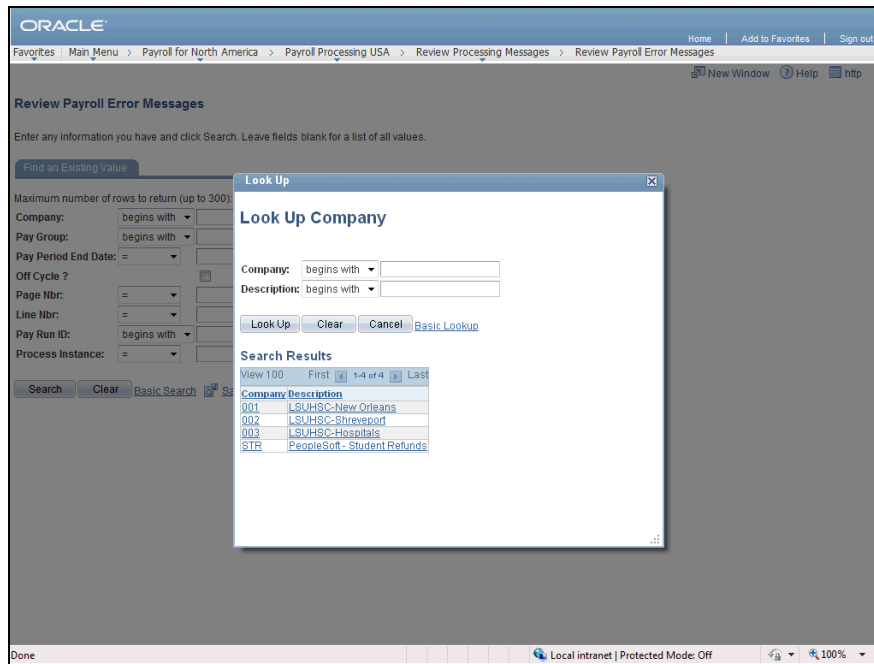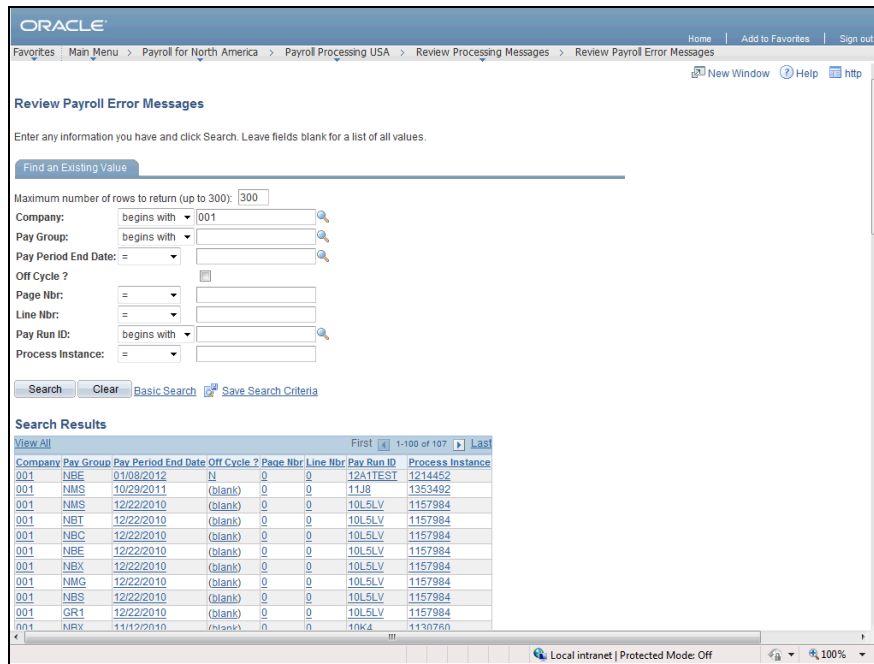
Step	Action
7.	Click the **LSUHSC-New Orleans** link.

LSUHSC-New Orleans
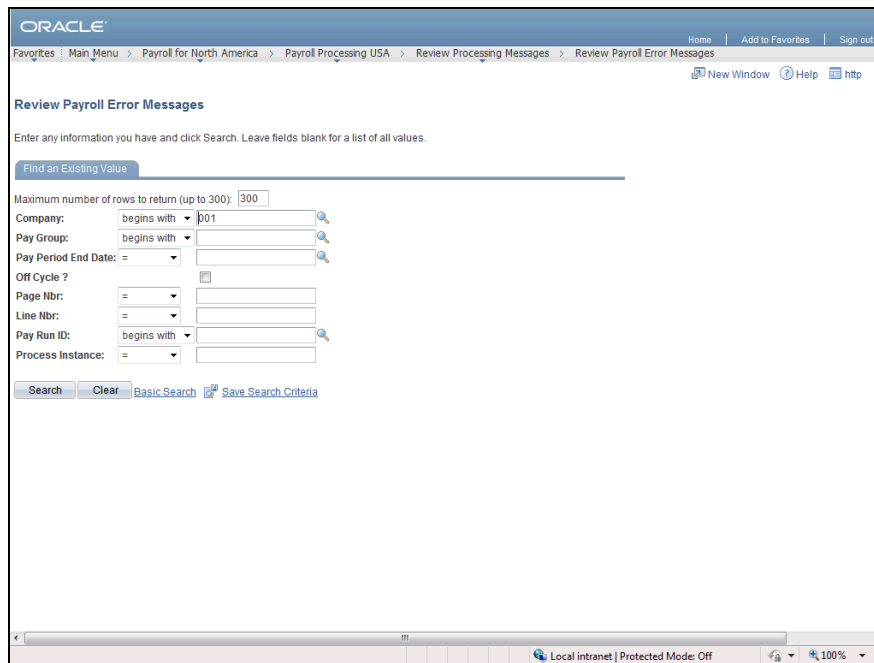
Step	Action
8.	Click the **Search** button.
	Search
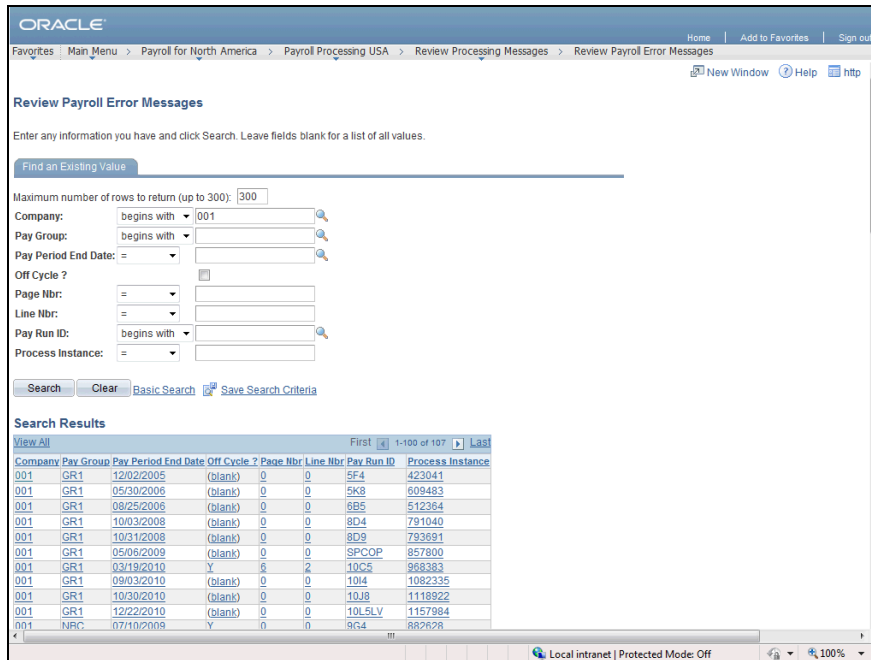
Step	Action
9.	Click the **Pay Period End Date** column header to sort the Pay Period End Date in descending order to retrieve current payroll information.
	Pay Period End Date

Step	Action
10.	Select a pay period from the list. Click the **01/08/2012** link. 01/08/2012

Step	Action
11.	Click the **Next in List** button to view the next error message. Next in List
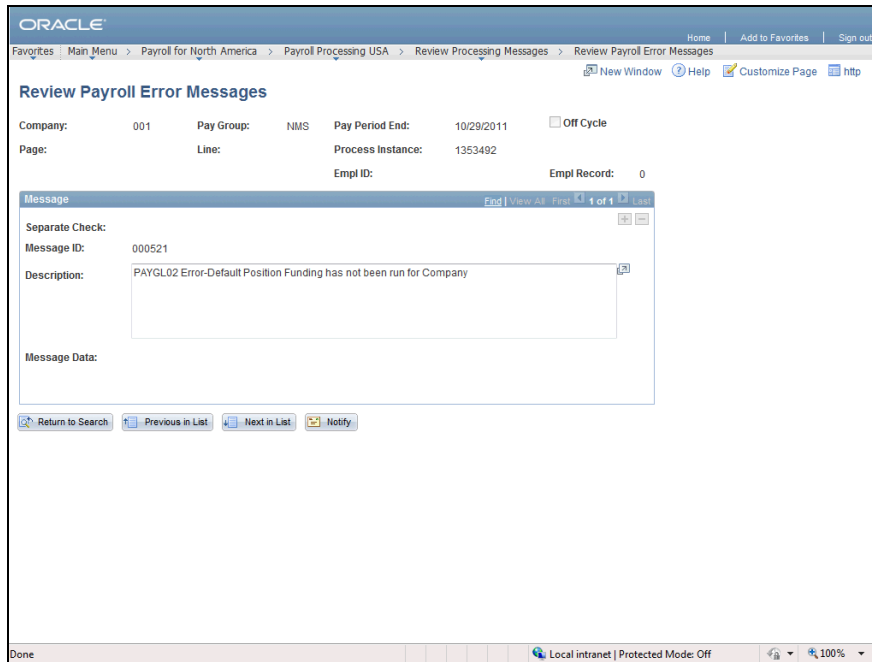
Step	Action
12.	Click the **Return to Search** button. Return to Search

Step	Action
13.	This completes the topic on View Payroll Error Messages. **End of Procedure.**

Update Payroll Data on a Payline

Procedure
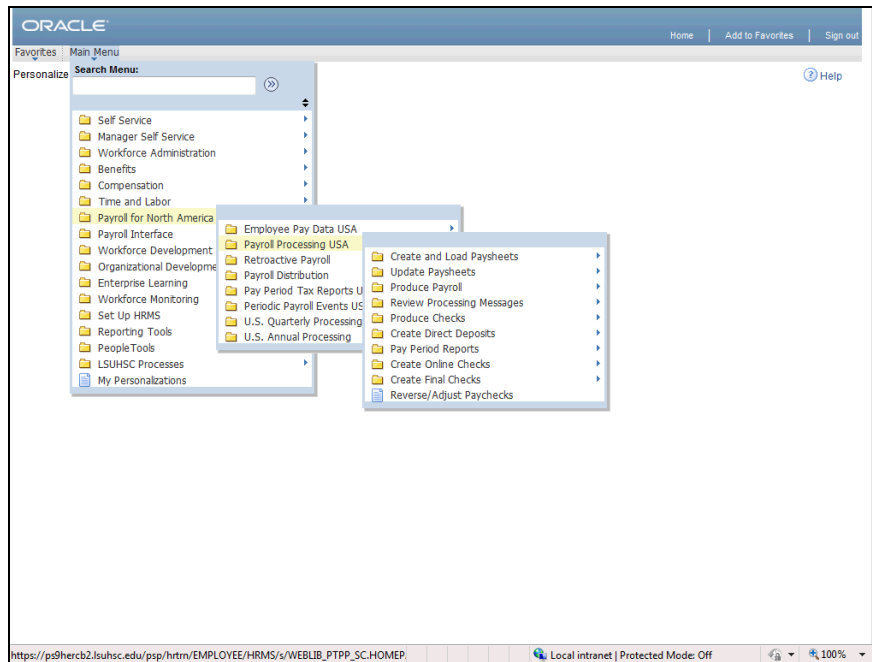
In this topic you will learn how to Update Payroll Data on a Payline.

Step	Action
1.	Click the **Main Menu** button. Main Menu
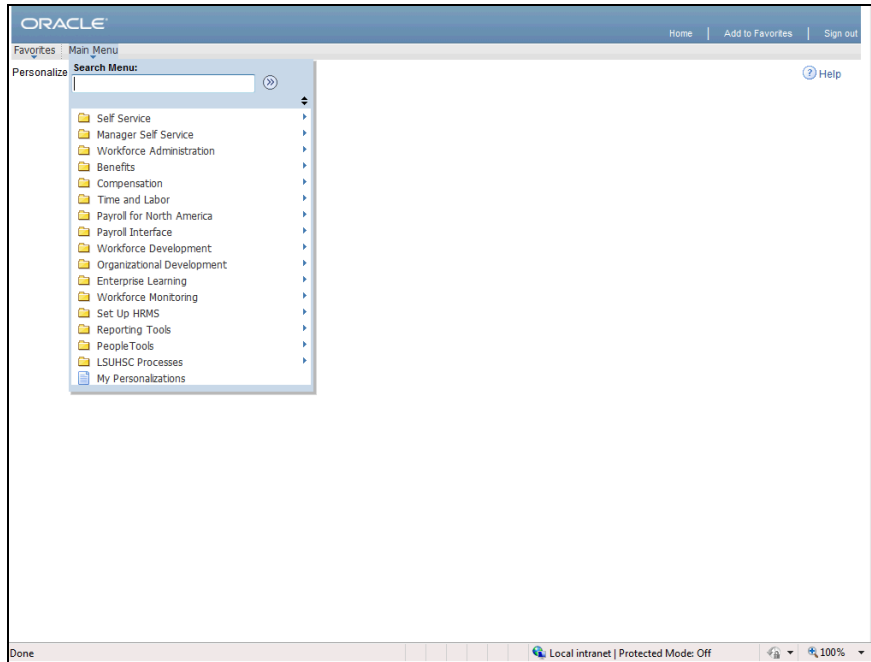
Step	Action
2.	Point to the **Payroll for North America** menu.
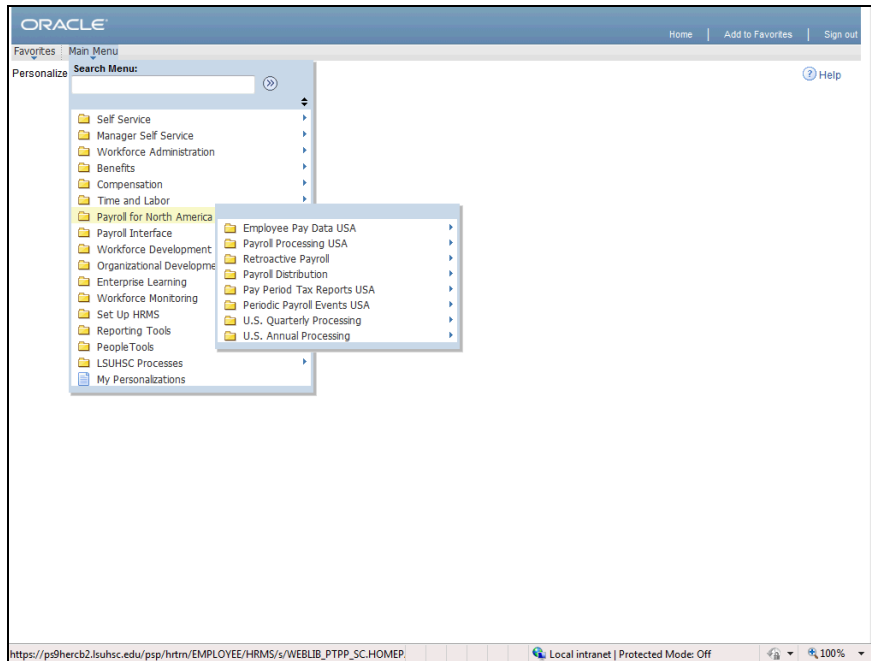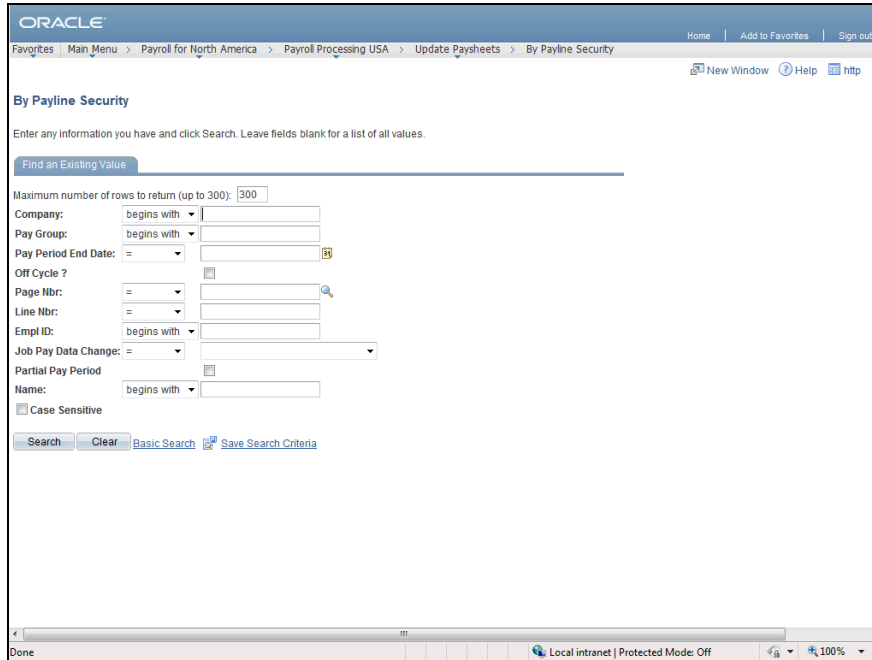
Step	Action
3.	Point to the **Payroll Processing USA** menu.
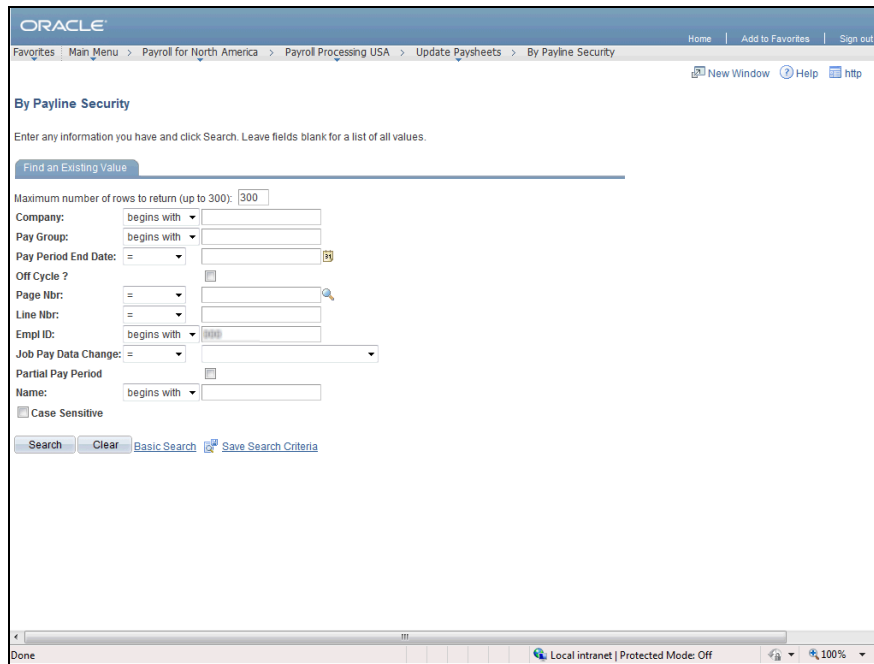
Step	Action
4.	Point to the **Update Paysheets** menu.
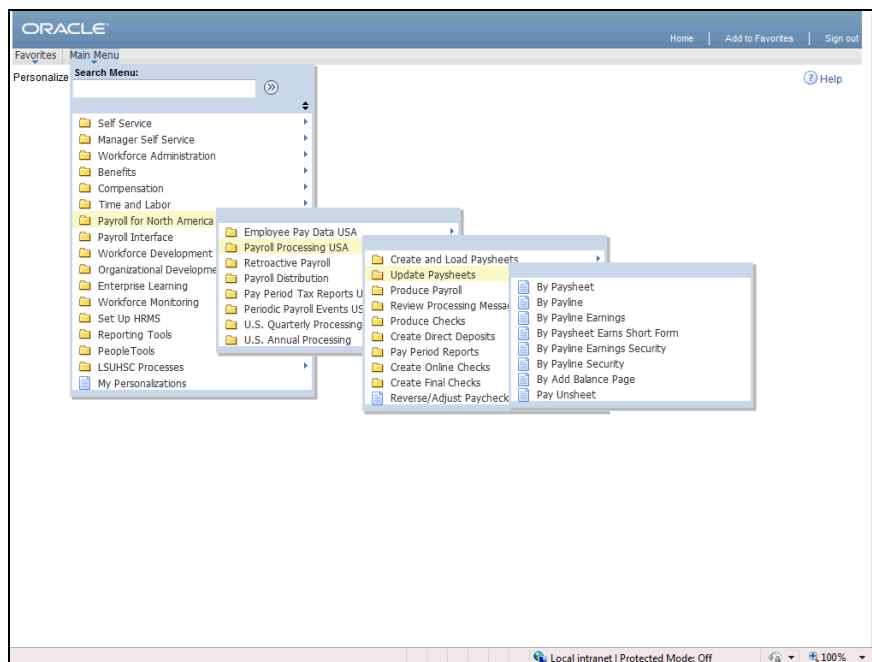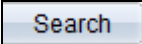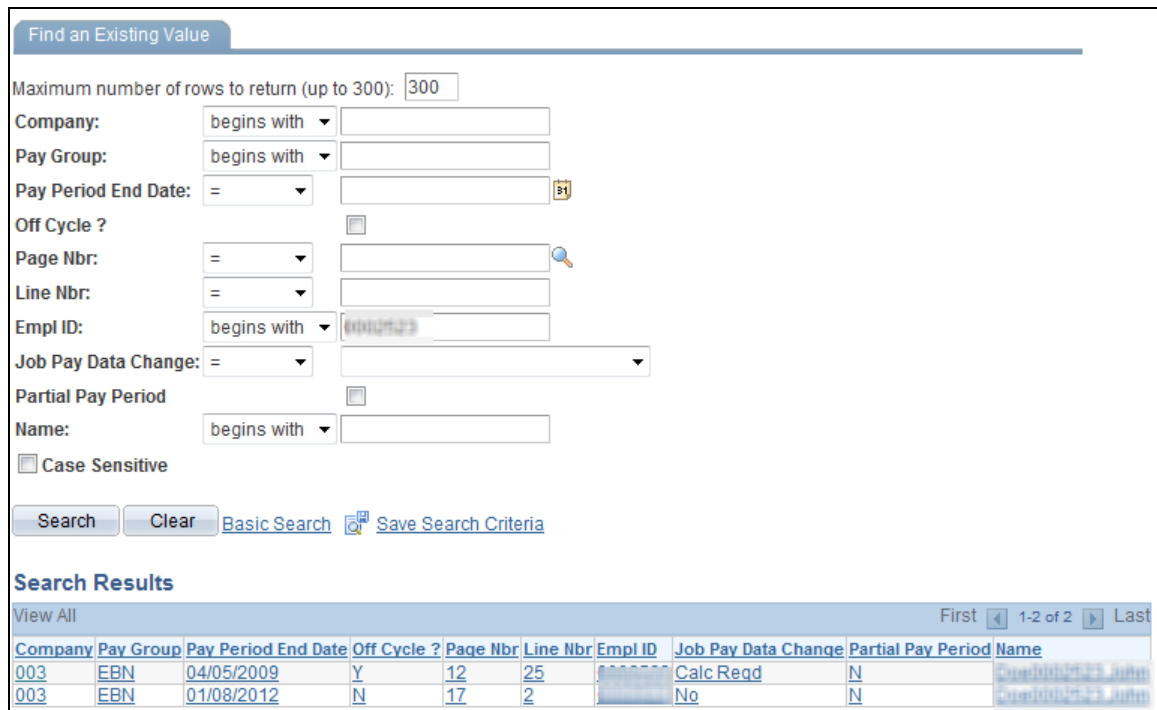
Step	Action
5.	Click the **By Payline Security** menu.

Step	Action
6.	Enter the desired information into the **Empl ID** field. Enter "**0000000**".

Step	Action
7.	Click the **Search** button.
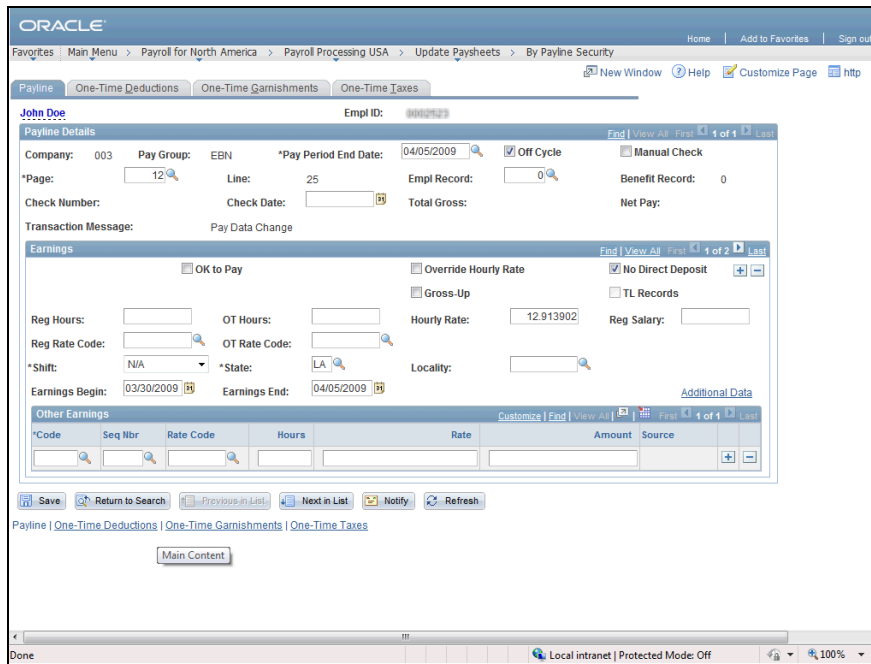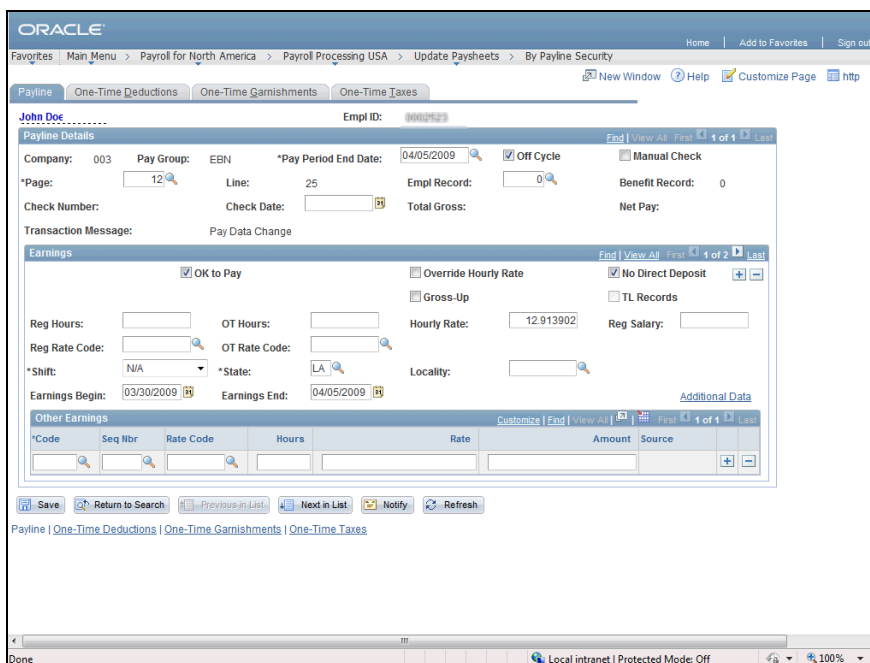
Step	Action
8.	Click the **04/05/2009** link.
	04/05/2009

Step	Action
9.	Click the **OK to Pay** checkbox.
	☐ OK to Pay

Step	Action
10.	Click the Additional Data link to add or change account information.

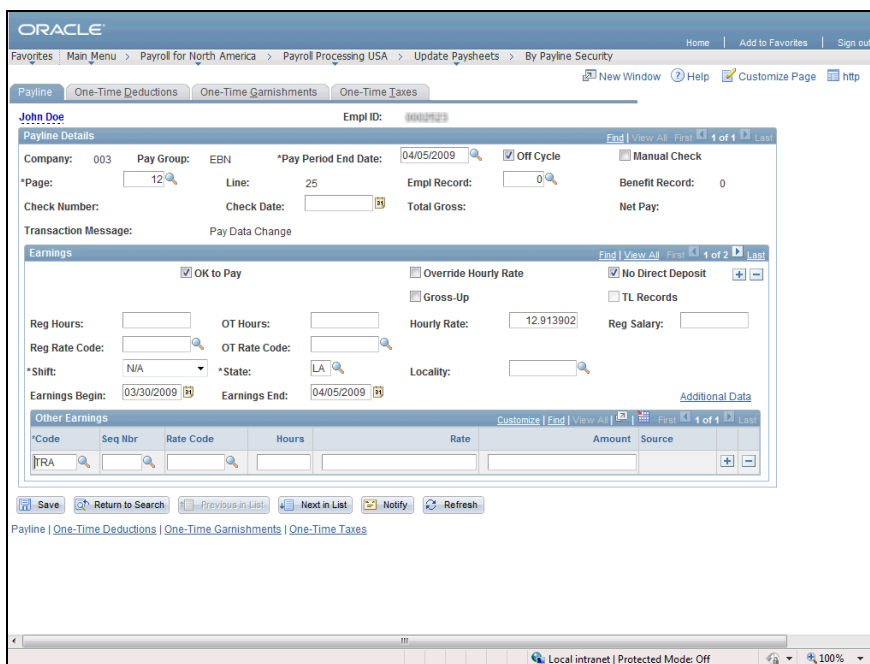| Step	Action
11.	**Note:** Employee information defaults into the fields on this page. Check to make sure the information is correct before you click the **OK** button. OK

Step	Action
12.	Click the **Look up Code** button.
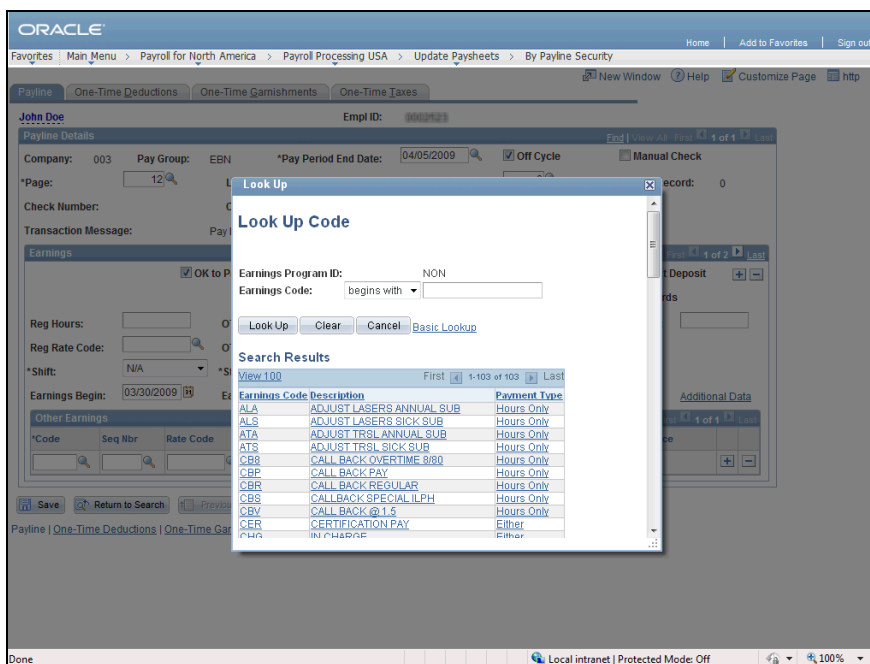
Step	Action
13.	Select an Earnings Code from the list.

Step	Action
14.	Enter the desired information into the **Hours** field. Enter "**80.00**".
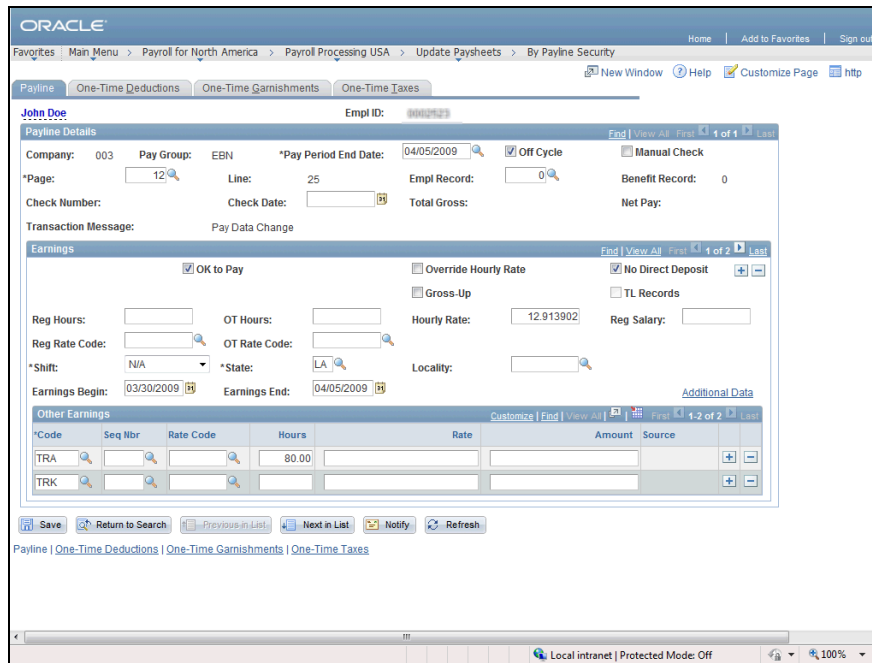
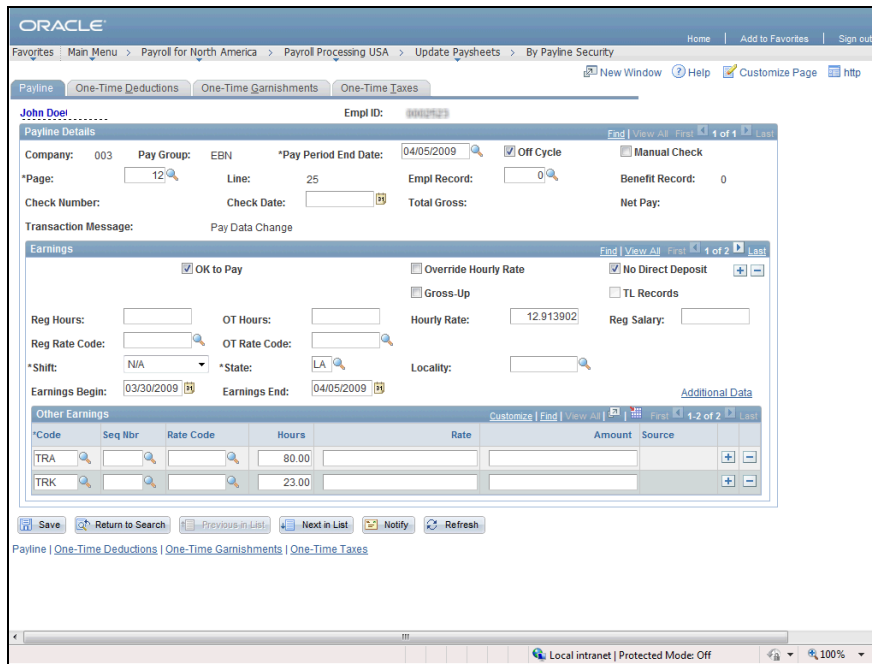| Step	Action
15.	Click the **Add a new row at row 1** button. ⊞

Step	Action
16.	You can use the Lookup button to display a list of Earning codes, or you can type the code directly into the Code field.

Step	Action
17.	Enter the desired information into the **Hours** field. Enter "**23.00**".

Step	Action
18.	Click the **One-Time Deductions** tab. One-Time Deductions

Step	Action
19.	Click the Plan Type drop-down arrow and select a Plan Type from the list.

Step	Action
20.	Click the **Look up Benefit Plan** button.
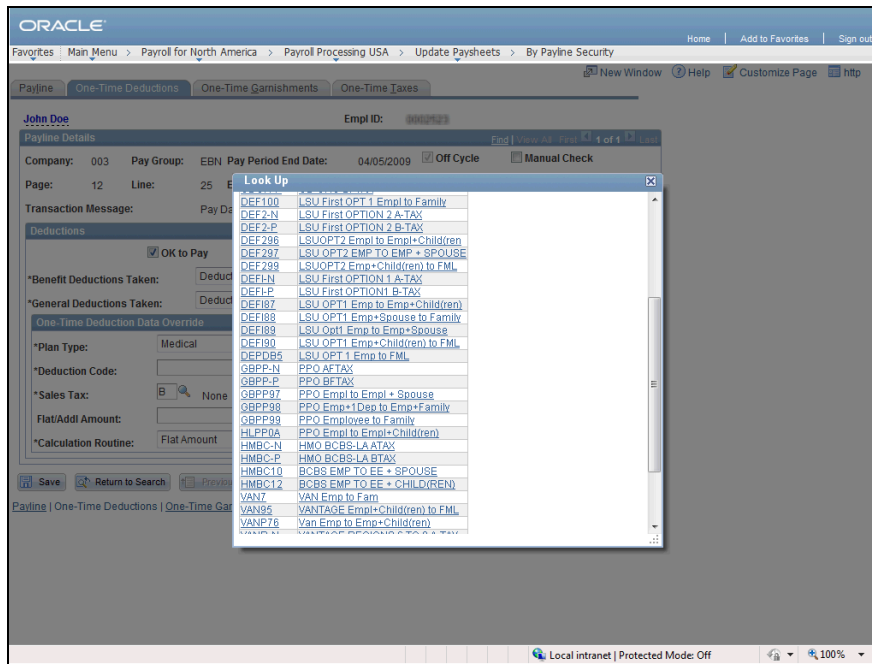
Step	Action
21.	Click the **HMO BCBS-LA ATAX** link. HMO BCBS-LA ATAX
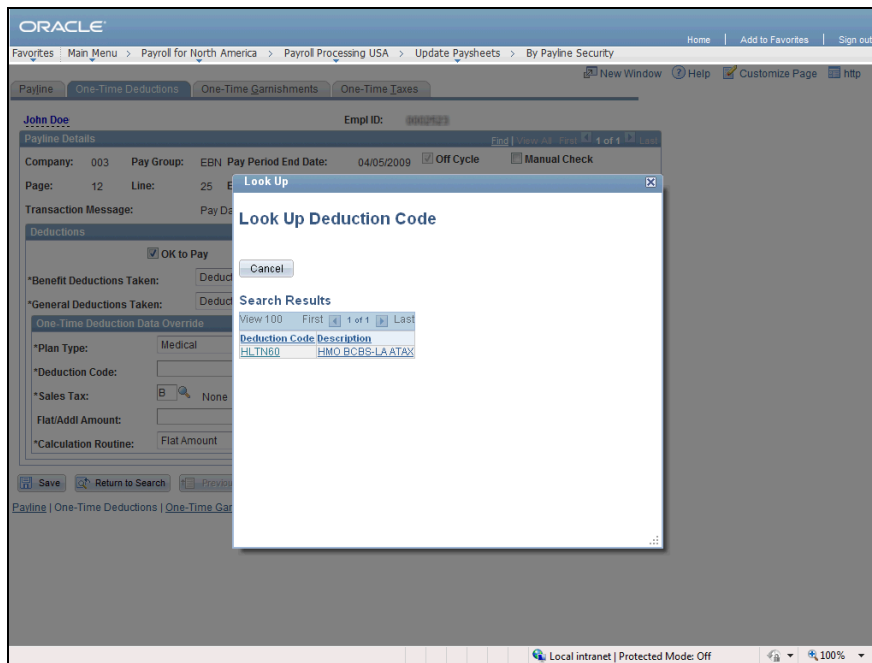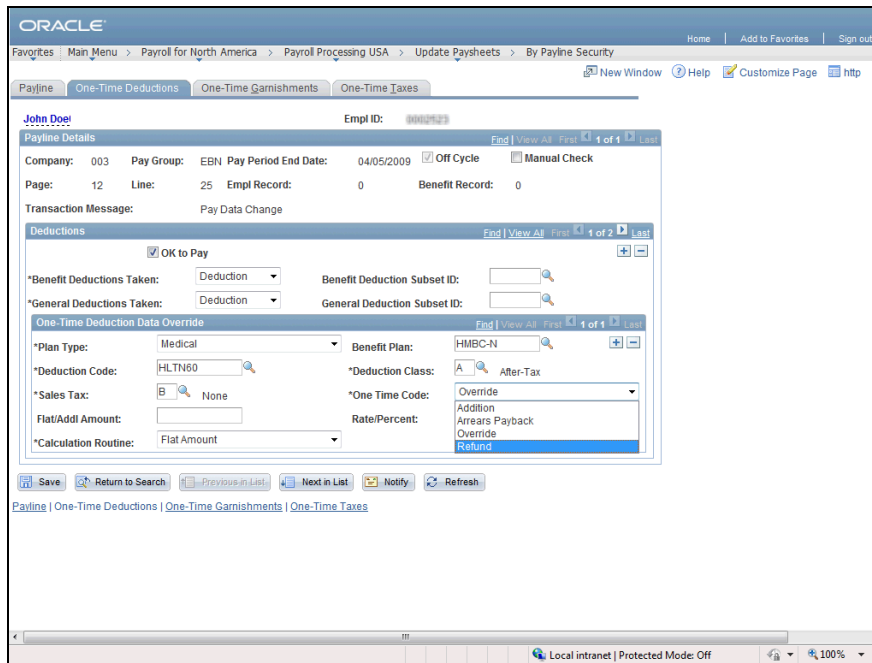
Step	Action
22.	Click the **Look up Deduction Code** button and select an option from the list. HLTN60

Step	Action
23.	Click the **Look up Deduction Class** button and select an option from the list.

Step	Action
24.	Enter the desired information into the **Flat/Addl Amount** field. Enter "**135.00**".

Step	Action
25.	Click the **One-Time Taxes** link.

Step	Action
26.	Click the **Federal** option.
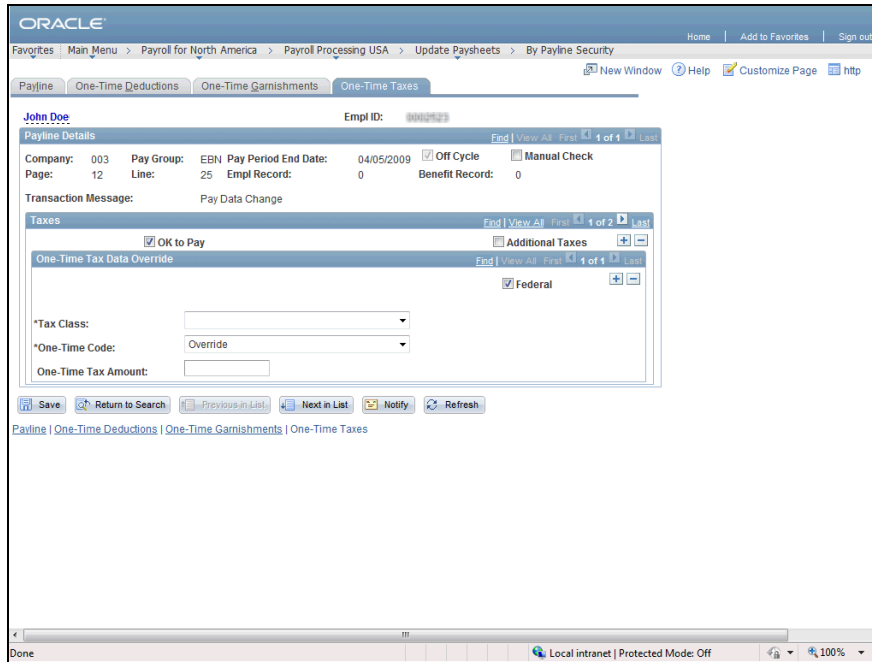
Step	Action
27.	Click the **Tax Class** drop-down arrow and select an option from the list.
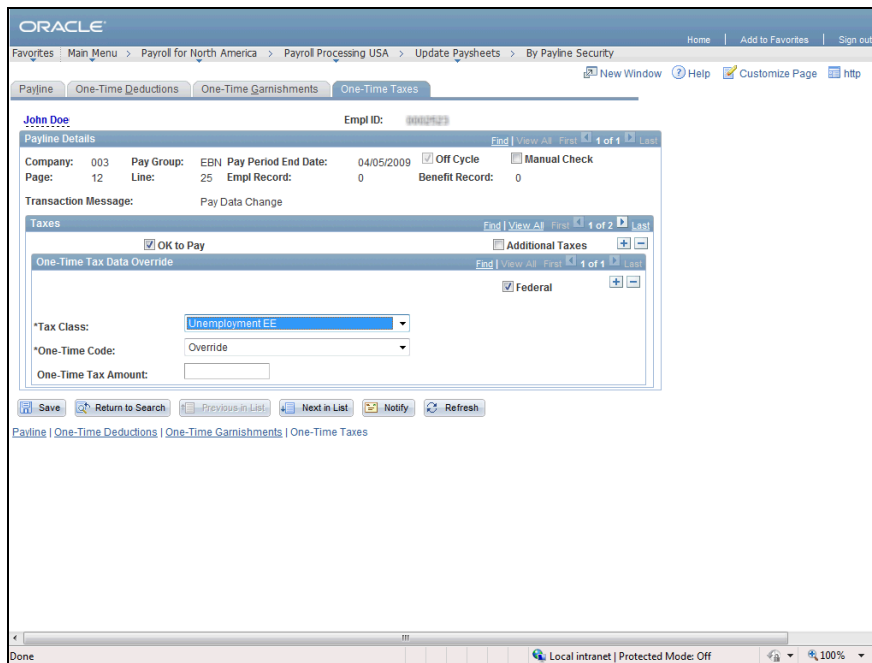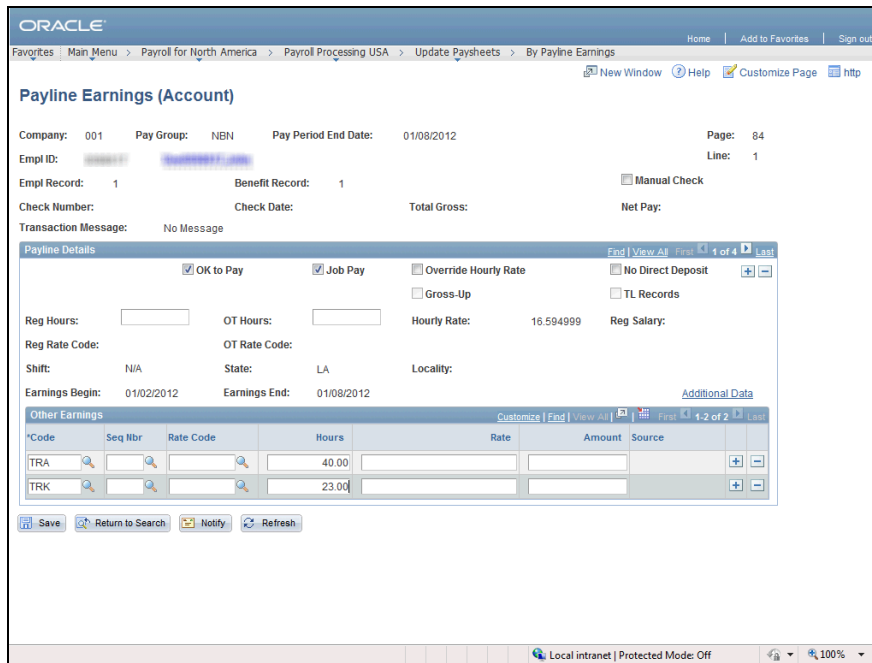
Step	Action
28.	Click the One-Time code drop-down arrow and select an option from the list.
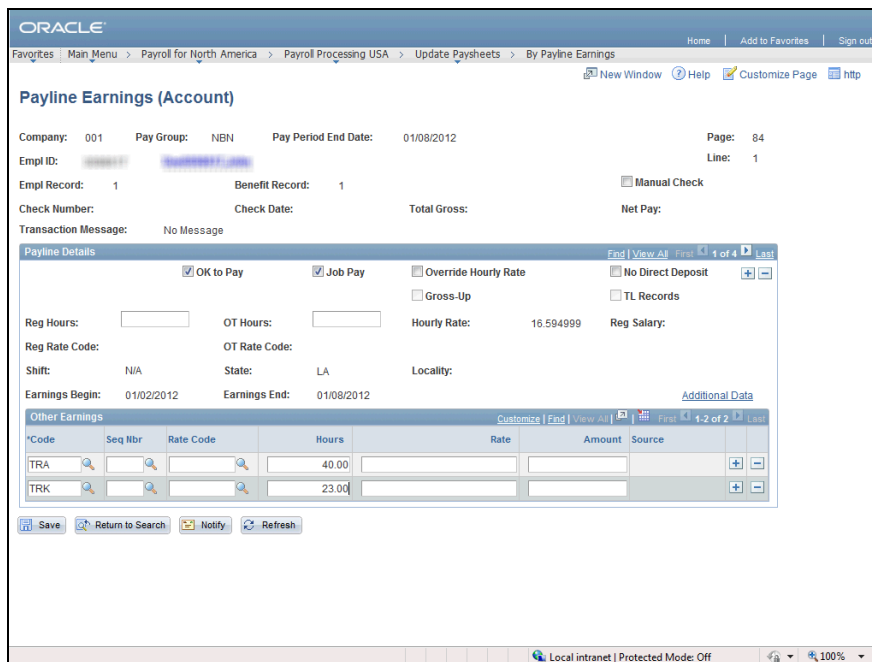
Step	Action
29.	Enter the desired information into the **One-Time Tax Amount** field. Enter "**62.00**".

Step	Action
30.	Click the **Save** button when input is complete.

Step	Action
31.	This completes the topic on how to Update Payroll Data on a Payline **End of Procedure.**